CONNECT
Maryland Judiciary

TRAINING GUIDE

CONNECT Employee Self Service

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CONNECTed

NOTES

CONNECT Employee Self Service

Student Name

Instructor(s) Name(s)

Class Date

Go Live Date

Help Desk 410-260-1114

Online Training Library: http://courtnet/connect/connected

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CONNECT Employee Self Service

Employee Self-Service

Important Information

Modern software evolves at an ever-increasing speed. A result is that there are updates to software on a regular basis. In the case of CONNECT, there will be regular updates, as needed, before Go live, and updates on a quarterly basis after Go Live. The on-line learning materials will be updated as well, which is why our on-line library of CONNECTed is such a valuable resource for you and for other learners.

This document is intended ONLY as a classroom session learning aide for CONNECTors. Portions of the content will change prior to CONNECT Go Live. The on-line documentation should always be considered as the current, accurate source. CONNECTors, and Judiciary employees, should regularly check for updates. Proactive notices will be available on the CONNECT portal and via email updates.

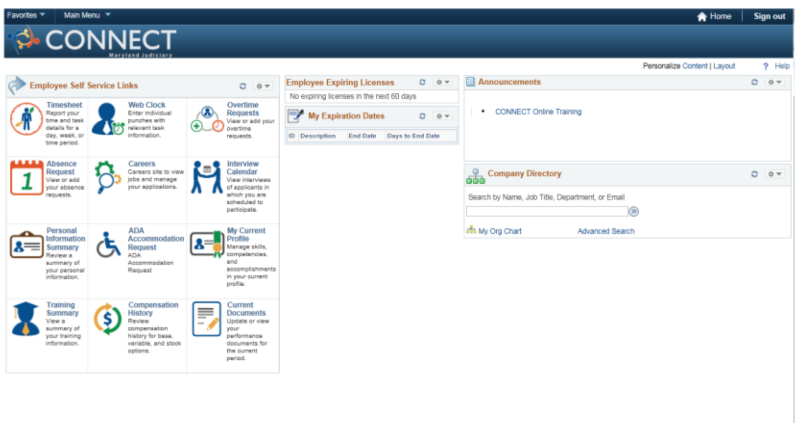
We recommend you always point other learners to the on-line resources available to them in CONNECTed.

Introducing Employee Self-Service

Employee HR Dashboard

The Employee Dashboard provides a quick view of:

- Self Service Links
- Expiring Licenses
- Expiration Dates
- Announcements
- Manager Expiration Dates
- Company Directory



Procedure - Job Aid

This topic will describe the various pagelets available in the Employee Dashboard.

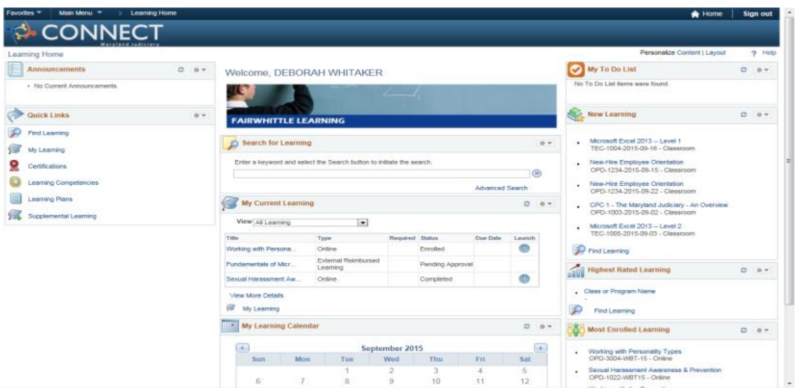
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**kenneth.luck**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT Employee HR Dashboard is a set with predefined pagelets. A pagelet is a small window that provides quick access and view to summary information.	

Step	Action	Notes
7.	The CONNECT Employee HR Dashboard will load the defaulted pagelets with summary information from various sources within the system. This page may vary per user. For security purposes, your CONNECT system logs you out of after 20 minute period of inactivity. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire.	
8.	The Employee Self Service Links provides you with quick access to the most frequently used pages by employees. The options available may vary per user role (for example only Managers will see the Manager Dashboard link).	
9.	The Employee Expiring Licenses pagelet provides alerts 60 days prior to expiration of licenses.	
10.	My Expiration Dates will show expiration alerts for Acting Capacity, Probation Periods and Contract Periods expiring within the next 30 days.	
11.	Announcements will be posted here by the Human Resources personnel. The announcements will be links that when clicked more information will be provided.	
12.	Click the **CONNECT Online Training** link. CONNECT Online Training	
13.	The announcement is displayed in a pop-up window. Click the **OK** button. OK	
14.	The Company Directory is a search option (by Name, Job Title, Department, or Email) that will provide you with an organizational chart view. The My Org Chart link will provide you with your organizational chart.	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed reviewing the Employee HR Dashboard **End of Procedure - Job Aid.**	

Employee Learning Dashboard

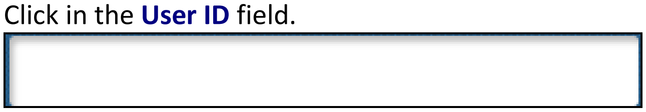
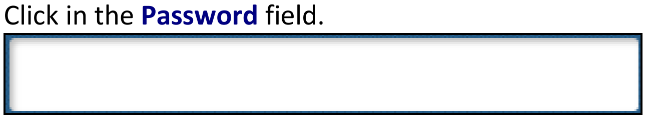
The Employee Learning Dashboard provides a quick view of:

- Announcements
- Quick Links
- Expiration Dates
- Search for Learning
- My Current Learning
- My Learning Calendar
- My To Do List
- New Learning
- Highest Rated Learning
- Most Enrolled Learning



Procedure - Job Aid

In this topic, you will review the Employee Learning Dashboard.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**deborah.whitaker**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	Click the **Learning Home** menu. Learning Home	
7.	View the **Announcements** pagelet. This pagelet displays Judiciary learning announcements. These announcements can be a companywide announcement or a more specific announcement for a certain group of learners.	
8.	View the **Quick Links** pagelet. These links are used to navigate quickly to the most frequently accessed learner pages.	
9.	View the **Search for Learning** pagelet. This pagelet allows a learner to use a basic keyword search to quickly find learning in the learning catalog.	
10.	View the **My Current Learning** pagelet. This pagelet allows a learner to view the status of their learning. Clicking on the Title links displays the details for that learning.	
11.	View the **My To Do List** pagelet. This pagelet allows a learner to view outstanding learning tasks. These tasks can be accessed directly using the links in the pagelet.	
12.	View the **New Learning** pagelet. This pagelet displays new learning opportunities that have been recently added to the learning catalog.	
13.	Click the **Vertical Scrollbar** to navigate down the page.	
14.	View the **My Learning Calendar** pagelet. This pagelet displays your learning events in a calendar. When a date is highlighted, it indicates you are enrolled in a class for that day. Clicking that date will allow you to see the details of the enrollment.	
15.	View the **Highest Rated Learning** pagelet. This pagelet displays learning that has received the highest ratings among other learners. Clicking the links in this pagelets displays the learning details.	

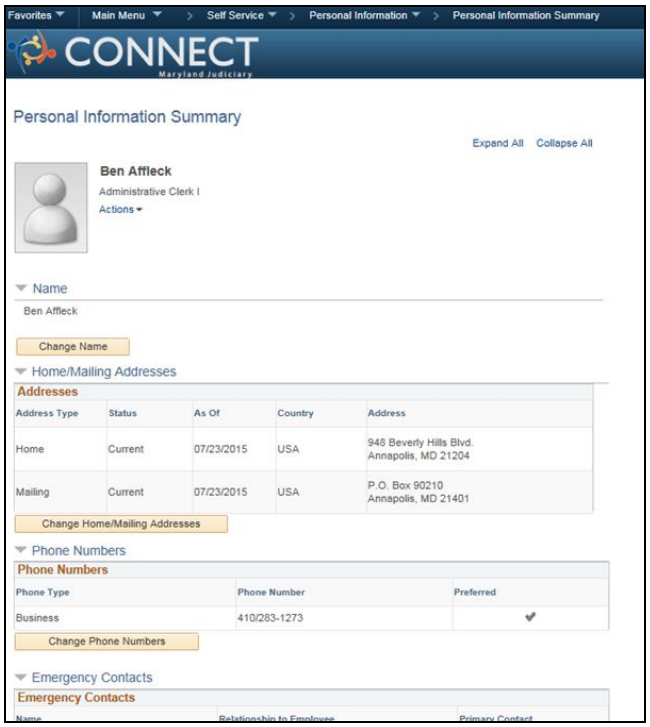
Step	Action	Notes
16.	View the **Most Enrolled Learning** pagelet. This pagelet displays the learning that has the highest enrollments in the Judiciary.	
17.	Click the **Vertical Scrollbar** to navigate up the page.	
18.	Click the **Home** link. 	
19.	Click the **Sign out** link. 	
20.	You have completed the review of the Employee Learning Dashboard. **End of Procedure - Job Aid.**	

Managing Human Resources

Managing Personal Information

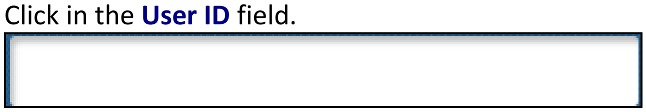
Viewing & Updating Personal Information

The Personal Information Summary page allows employees to keep their information up to date including home and mailing address, phone numbers, emergency contacts, email address, and ethnic group.



Procedure - Job Aid

In this topic, you will view and update your personal information from the Personal Information Summary page.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**ben.affleck**" into the **User ID** field.	

Step	Action	Notes
3.	Click in the **Password** field.	
4.	Enter "**test123**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Personal Information Summary** link. Personal Information Summary	
7.	Use the Personal Information Summary page to view and update personal information such as: • Address • Phone Number • Emergency Contacts • Email Address • Marital Status • Ethnic Group	
8.	Click the **Change Home/Mailing Addresses** button. Change Home/Mailing Addresses	
9.	**NOTE:** Once you update your Home Address you must submit a W-4 form with the state. http://www.irs.gov/ (http://www.irs.gov/)	
10.	You have the ability to add a new address or edit an existing address.	
11.	Click the **Edit** button to edit the current home address.	
12.	Click in the **Address 1** field.	
13.	Press **[Backspace]** to delete 123 Main St.	
14.	Enter "**948 Beverly Hills Blvd.**" into the **Address 1** field.	
15.	Click the **Save** button. Save	
16.	Click the **OK** button. OK	
17.	Notice the address reflects the changes that were just entered.	
18.	Click the **Address Type** drop-down list.	

Step	Action	Notes
19.	Click the **Mail** list item. Mail	
20.	Click the **Add** button. Add	
21.	Click in the **Address 1** field.	
22.	Enter "**P.O. Box 90210**" into the **Address 1** field.	
23.	Click in the **City** field.	
24.	Enter "**Annapolis**" into the **City** field.	
25.	Click in the **State** field.	
26.	Enter "**MD**" into the **State** field.	
27.	Click in the **Postal** field.	
28.	Enter "**21401**" into the **Postal** field.	
29.	Click the **Save** button. Save	
30.	Note the message indicating the update was successful.	
31.	Click the **OK** button. OK	
32.	Notice you have updated an existing address and added a mailing address.	
33.	Click the **Return to Personal Information** link. Return to Personal Information	
34.	Click the **Vertical Scrollbar** to scroll down the page.	
35.	Click the **Change Email Addresses** button. Change Email Addresses	
36.	Business email address cannot be updated.	
37.	Click the **Add Email Address** button. Add Email Address	
38.	Click the **Email Type** drop-down list.	
39.	Click the **Home** list item. Home	

Step	Action	Notes
40.	Click in the **Email Address** field.	
41.	Enter "**ben.affleck@email.com**" into the **Email Address** field.	
42.	Click the **Save** button. Save	
43.	Click the **OK** button. OK	
44.	Click the **Return to Personal Information** link. Return to Personal Information	
45.	Click the **Vertical Scrollbar** to scroll down the page.	
46.	Click the **Change Emergency Contacts** button. Change Emergency Contacts	
47.	Click the **Add Emergency Contact** button. Add Emergency Contact	
48.	Click in the **Contact Name** field.	
49.	Enter "**Jennifer Garner**" into the **Contact Name** field.	
50.	Click the **Relationship to Employee** drop-down list. Other	
51.	Click the **Spouse** list item. Spouse	
52.	Click the **Contact has the same address as the employee** option. Contact has the same address as the employee	
53.	Click in the **Telephone** field.	
54.	Enter "**4102402797**" into the **Telephone** field.	
55.	Click the **Save** button. Save	
56.	Click the **OK** button. OK	
57.	Notice Jennifer Garner has been added as an emergency contact.	
58.	Click the **Primary Contact** option.	
59.	Click the **Save** button. Save	

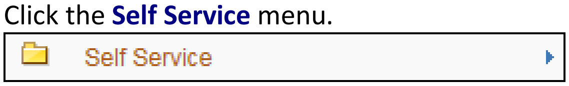
Step	Action	Notes
60.	Click the **OK** button. OK	
61.	Click the **Return to Personal Information** link. Return to Personal Information	
62.	Click the **Vertical Scrollbar** to scroll down the page.	
63.	Click the **Change Ethnic Groups** button. Change Ethnic Groups	
64.	Click the **Add an Ethnic Group** button. Add an Ethnic Group	
65.	Click the **Description** drop-down list.	
66.	Click the **White** list item.	
67.	Click the **Save** button. Save	
68.	Click the **OK** button. OK	
69.	Click the **Return to Personal Information** link. Return to Personal Information	
70.	The changes made to your address, emergency contacts, email address, and ethnic groups are now reflected in your Personal Information Summary.	
71.	Click the **Vertical Scrollbar** to scroll down the page.	
72.	View the details to ensure the updates are complete and accurate.	
73.	You have completed updating your personal information. Click the **Home** link. Home	
74.	Click the **Sign out** link. Sign out	
75.	You have completed the topic "Viewing & Updating Personal Information". **End of Procedure - Job Aid.**	

Submitting a Name Change

You can use CONNECT to submit a name change. Upon submitting the change, the request is sent to an HR Administrator to review and approve the name change before it is finalized.

Procedure - Job Aid

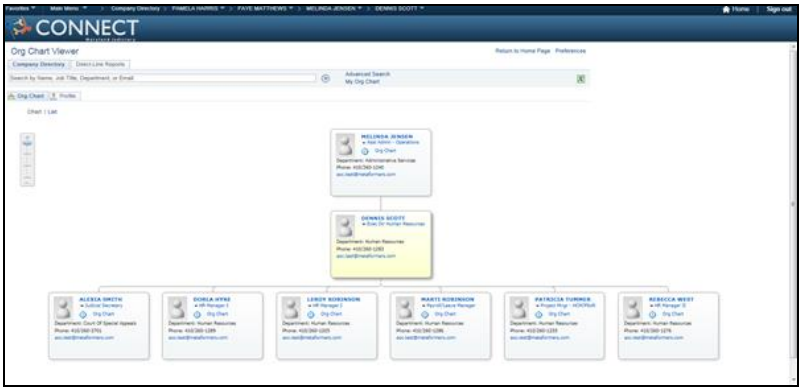
In this topic, you will submit a name change.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.moran**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	

Step	Action	Notes
8.	Click the **Personal Information** menu. Personal Information	
9.	Click the **Name Change** menu. Name Change	
10.	Notice the "Change As Of" date defaults with the current date. You can change this date if your name change will go into effect on a different date.	
11.	Click the **Edit Name** button. Edit Name	
12.	Click in the **Last Name** field. MORAN	
13.	Press **[Backspace]** to delete Moran.	
14.	Enter "**Fletcher**" into the **Last Name** field.	
15.	Click the **Refresh Name** button. Refresh Name	
16.	Notice the name displays Amy Fletcher and not Amy Moran.	
17.	Click the **OK** button. OK	
18.	Click the **Submit** button. Submit	
19.	Note: Before the name change is finalized in CONNECT, it will be reviewed and approved by an HR Administrator.	
20.	Click the **OK** button. OK	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Submitting a Name Change". **End of Procedure - Job Aid.**	

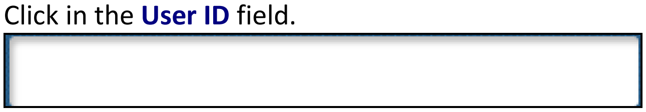
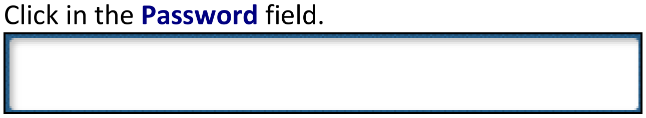
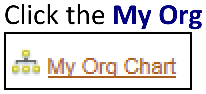
Viewing the Organizational Chart

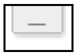
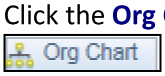
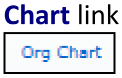
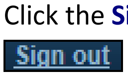
This organizational visualization and navigation directory offers functionality beyond a typical organization chart by supporting and identifying direct-line reporting chains. The org chart viewer displays a person within a three-tiered graphical representation of the reporting structure.



Procedure - Job Aid

In this topic, you will view your position on an organizational chart and view your direct and indirect reporting structure.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**dennis.scott**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **My Org Chart** link. 	
7.	The Organizational Chart shows your direct-line reports. By default, your square in the chart is highlighted.	

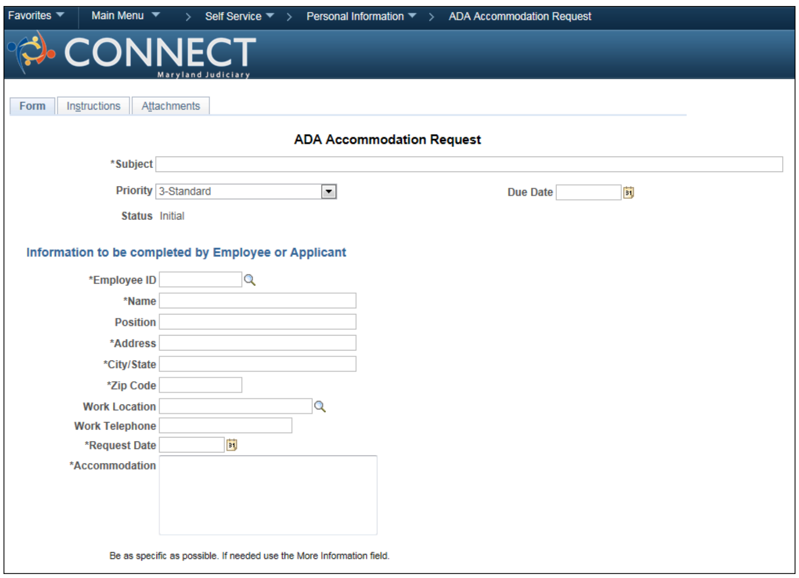
Step	Action	Notes
8.	Click the **minus "-"** button to zoom out on the organizational chart. 	
9.	Notice the chart got smaller. You can continue to zoom out to get a more complete view of the chart.	
10.	Click the "**Right**" arrow to view the right side of the organizational chart. 	
11.	Click the "**Left**" arrow to view the left side of the organizational chart. 	
12.	Click the "**Initial Point**" button to return to the center of the organizational chart. 	
13.	You can view your profile information and HR data from the Profile tab. Alternatively, you can view other direct line report's profile and HR data by selecting a different name in the organizational chart. Click the **Profile** tab 	
14.	Review the data on the Profile page	
15.	Click the **Org Chart** tab to return to the organizational chart. 	
16.	To view the direct-line reports for another person, click the **Org Chart** link in the box for the desired individual. 	
17.	View the organizational structure for Jeanette Hyre.	
18.	You have the option to download the organizational chart detail information you are viewing as an Excel file.	
19.	You have completed viewing the organizational chart. Click the **Home** link. 	
20.	Click the **Sign out** link. 	

Step	Action	Notes
21.	You have successfully completed the topic "Viewing the Organizational Structure". **End of Procedure - Job Aid.**	

Requesting ADA Accommodations

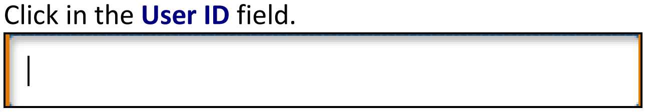
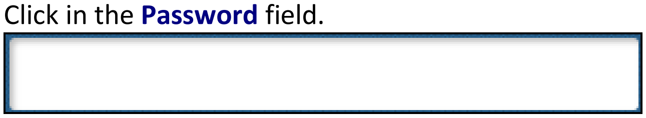
Submitting an ADA Accommodation Request

CONNECT allows you to enter the details for an ADA Accommodation Request, submit the request, and monitor the approval status of the request.



Procedure - Job Aid

In this topic, you will enter the details for an ADA Accommodation, submit the request, and view the approval status.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**rebecca.miller**" into the **User ID** field.	
3.	Click in the **Password** field. 	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **ADA Accommodation Request** link. ADA Accommodation Request	
7.	Click the **Add a New Value** tab. Add a New Value	
8.	The ADA Accommodation Request page will auto populate some of the Employee or Applicant Information. Update the details of your accommodation request, if needed.	
9.	Click in the **Work Telephone** field.	
10.	Enter "**410-494-2184**" into the **Work Telephone** field.	
11.	Click in the **Request Date** field.	
12.	The Request Date is the date the accommodation is required. Enter "**06/28/2015**" into the **Request Date** field.	
13.	Enter all information specific to the ADA Accommodation Request. Click in the **Accommodation** field.	
14.	Enter "**I require a ramp to access the office with my wheelchair.**" into the **Accommodation** field.	
15.	Click the **Vertical** scrollbar to move down the page.	
16.	The form will need to be saved first and then submitted to go to the approver. Click the **Save** button. Save	
17.	Click the **Vertical** scrollbar to move up the page.	
18.	Click the **Submit** button. Submit	

Step	Action	Notes
19.	**NOTE:** The first approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
20.	The approval chain displays the individuals who will receive, review, and either approve or deny the request. In this example, the request will flow from ADA Field Coordinator to ADA Officer to Administrative Official.	
21.	Click the **OK** button. 	
22.	Click the **Home** link. 	
23.	Click the **Sign out** link. 	
24.	You have completed the details for an ADA Accommodation, submit the request, and view the approval status. **End of Procedure - Job Aid.**	

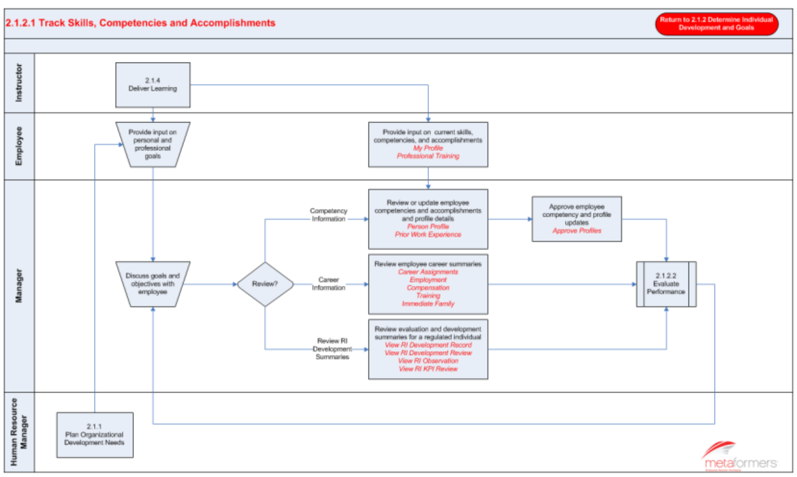
Managing Personal Profile Information

Profiles are used by the Judiciary to describe the attributes of jobs and individuals. These profiles summarize the competencies, qualifications, and skills of a job and a person. Profiles are valuable for tracking employees' skills, competencies, and accomplishments, in career planning, for identifying training needs, and for performance management.

CONNECT provides employees and managers with two profile types:

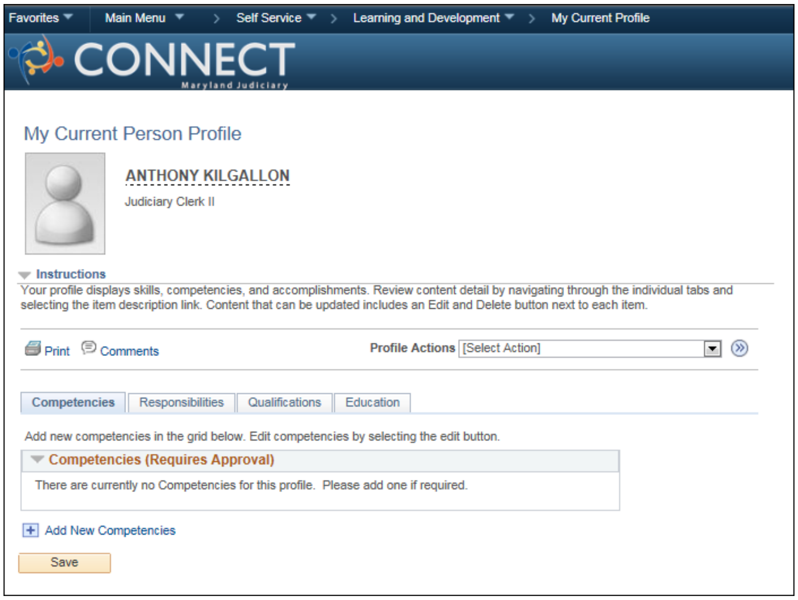
- Person profiles - Person profiles describe your skills, competencies, accomplishments and performance.
- Job profiles - Job profiles describe the competencies, qualifications, and responsibilities of a job.

As an employee, you can create, view, and update your personal profile. You can also compare your profile to the job you have or jobs you are interested in.



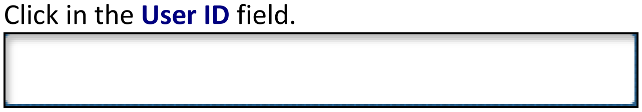
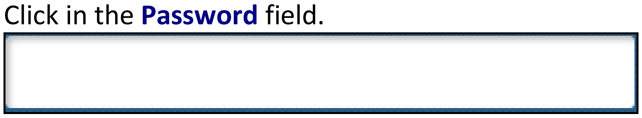
Updating My Personal Profile

Updating my personal profile with competencies, qualifications, and education.



Procedure - Job Aid

In this topic, you will add competencies, qualifications, and education to your personal profile.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**anthony.kilgallon**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	

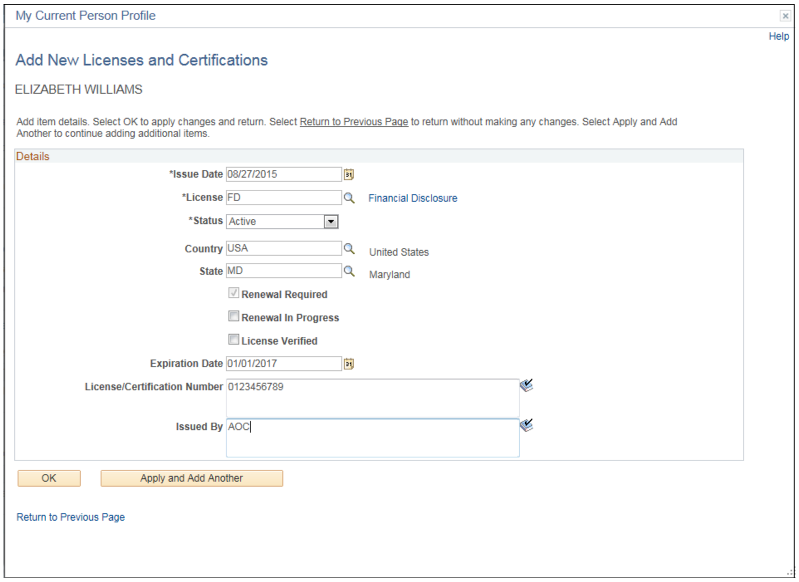
Step	Action	Notes
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **My Current Profile** menu. My Current Profile	
10.	Building your profile in CONNECT enables you to identify all the jobs within the Judiciary that are related to your profile. You can add competencies, qualifications, and education to your personal profile.	
11.	Begin by adding a competency to your profile. Click the **Add New Competencies** link. Add New Competencies	
12.	Click the **Look up Competency** button.	
13.	Click the **Time Management** link. Time Management	
14.	Click the **Evaluation Type** drop-down list.	
15.	Click the **Supervisor/Manager** list item. Supervisor/Manager	
16.	Click the **Proficiency** drop-down list.	
17.	Click the **Exceeds Standards** list item. Exceeds Standards	
18.	Click the **Vertical** Scrollbar to navigate down the page.	
19.	Click the **OK** button. OK	
20.	Click the **Save** button. Save	
21.	Click the **Submit** button. Submit	
22.	Notice the message indicating the competency has been submitted for approval.	

Step	Action	Notes
23.	Click the **OK** button. OK	
24.	Click the **1 item(s) pending approval** link. 1 item(s) pending approval	
25.	Notice the competency **"Time Management"** is pending manager approval.	
26.	Click the **Return to Previous Page** link. Return to Previous Page	
27.	The Judiciary will not be using Responsibilities as part of your profile.	
28.	Click the **Qualifications** tab. Qualifications	
29.	Click the **Vertical** scrollbar to move down the page.	
30.	Click the **Add New Licenses and Certifications** link. Add New Licenses and Certifications	
31.	Click in the **License** field.	
32.	Enter "**cla**" into the **License** field.	
33.	Click in the **Country** field.	
34.	Enter "**usa**" into the **Country** field.	
35.	Click in the **State** field.	
36.	Enter "**md**" into the **State** field.	
37.	Click the **License Verified** checkbox. License Verified	
38.	Click in the **Expiration Date** field.	
39.	Enter "**12/31/2017**" into the **Expiration Date** field.	
40.	Click the **OK** button. OK	
41.	Click the **Education** tab. Education	
42.	Click the **Add New Degrees** link. Add New Degrees	

Step	Action	Notes
43.	Click in the **Date Acquired** field. 07/29/2015	
44.	Enter "**07/29/2014**" into the **Date Acquired** field.	
45.	Click the **Look up Degree** button.	
46.	Click the **Master of Business Admin** link. Master of Business Admin	
47.	Click the **OK** button. OK	
48.	Click the **Save** button. Save	
49.	Click the **Submit** button. Submit	
50.	Click the **OK** button. OK	
51.	Click the **2 item(s) pending approval** link. 2 item(s) pending approval	
52.	Notice the degree "**MBA**" has been added to the items pending manager approval.	
53.	Click the **Return to Previous Page** link. Return to Previous Page	
54.	If desired, you can print or save a PDF copy of your profile by clicking the print link.	
55.	Click the **Home** link. Home	
56.	Click the **Sign out** link. Sign out	
57.	You have completed the topic "Updating My Personal Profile". **End of Procedure - Job Aid.**	

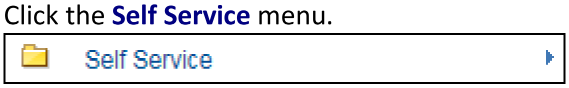
Adding Financial Disclosure to My Profile

Based on your income level, you might be required by the state to submit a financial disclosure. The process to complete the financial disclosure is not changing. However, once you have completed it, you will add the financial disclosure as a certification to your personal profile.



Procedure - Job Aid

In this topic, you will add a Financial Disclosure to your personal profile.

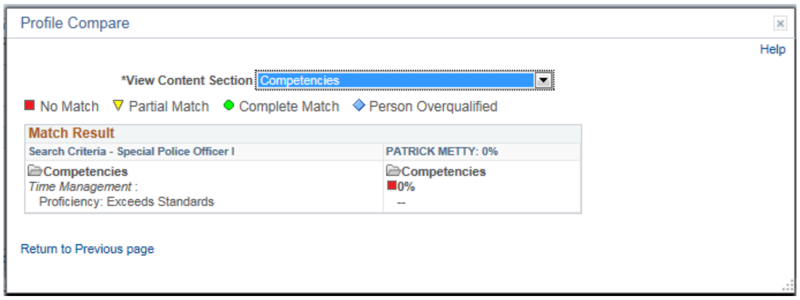
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**elizabeth.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	

Step	Action	Notes
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **My Current Profile** menu. My Current Profile	
10.	Click the **Qualifications** tab. Qualifications	
11.	Click the **Vertical** scrollbar to move down the page.	
12.	Click the **Add New Licenses and Certifications** link. Add New Licenses and Certifications	
13.	After completing your financial disclosure, enter the following information into the license/certification fields: • License • Country • State • Expiration Date • Financial Disclosure Number • Issued by	
14.	Click in the **License** field.	
15.	Enter "**fd**" into the **License** field.	
16.	Click in the **Country** field.	
17.	Enter "**usa**" into the **Country** field.	
18.	Click in the **State** field.	
19.	Enter "**md**" into the **State** field.	
20.	Click in the **Expiration Date** field. 08/27/2016	
21.	Press **[Backspace]** to clear the field.	
22.	Enter "**01/01/2017**" into the **Expiration Date** field.	
23.	Click in the **License/Certification Number** field.	
24.	Enter "**0123456789**" into the **License/Certification Number** field.	
25.	Click in the **Issued By** field.	
26.	Enter "**AOC**" into the **Issued By** field.	

Step	Action	Notes
27.	Click the **OK** button. OK	
28.	Click the **Save** button. Save	
29.	Click the **Submit** button. Submit	
30.	Your financial disclosure information will be reviewed and approved by your manager.	
31.	Click the **OK** button. OK	
32.	Click the **Home** link. Home	
33.	Click the **Sign out** link. Sign out	
34.	You have completed the topic "Adding Financial Disclosure to My Profile". **End of Procedure - Job Aid.**	

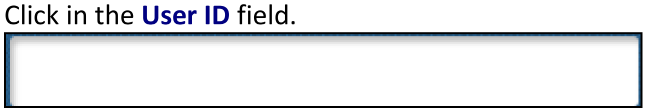
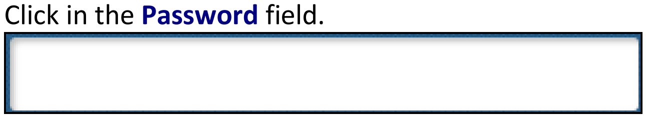
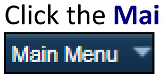
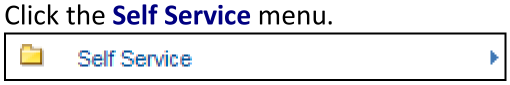
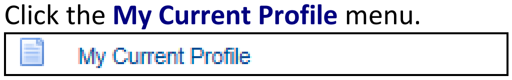
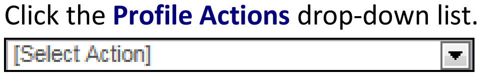
Comparing My Profile to My Current Job

CONNECT allows you to compare your personal profile to your job profile to identify any discrepancies that might exist.



Procedure - Job Aid

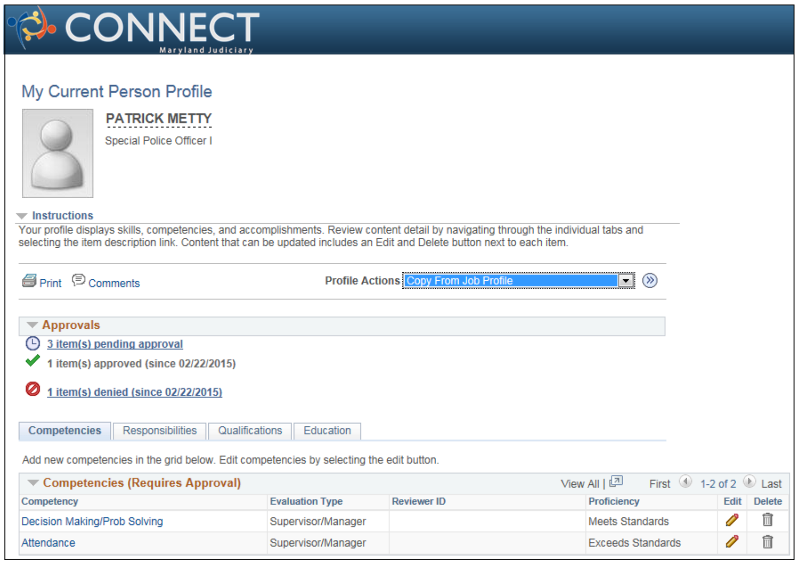
In this topic, you will compare your personal profile with your job profile.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**patrick.metty**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Learning and Development** menu. 	
9.	Click the **My Current Profile** menu. 	
10.	Click the **Profile Actions** drop-down list. 	

Step	Action	Notes
11.	Click the **Compare my profile to my current job** list item. Compare my profile to my current job	
12.	Click the **Go** button.	
13.	Click the **View Content Section** drop-down list. <View All Sections>	
14.	Click the **Competencies** list item. Competencies	
15.	Compare the competencies associated with the Special Police Officer 1 job (Time Management) to Patrick's competencies. In this example, there is a 0% match indicating that Patrick's profile does not match his job profile.	
16.	If your personal profile does not match your job profile, you can copy your job profile in order to build your personal profile. The steps to do this are explained in the topic titled "Copying My Current Job Profile".	
17.	Click the **Return to Previous page** link. Return to Previous page	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Comparing My Profile to My Current Job". **End of Procedure - Job Aid.**	

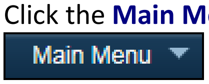
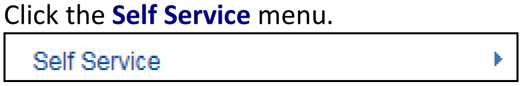
Copying My Current Job Profile

Copying your job profile allows you to take all the attributes of your job profile and add them to your personal profile so your job and personal profiles are in sync. It is important to note that any competencies added to your profile will need to be approved by your manager before your profile is finalized.



Procedure - Job Aid

In this topic, you will copy your job profile to your personal profile.

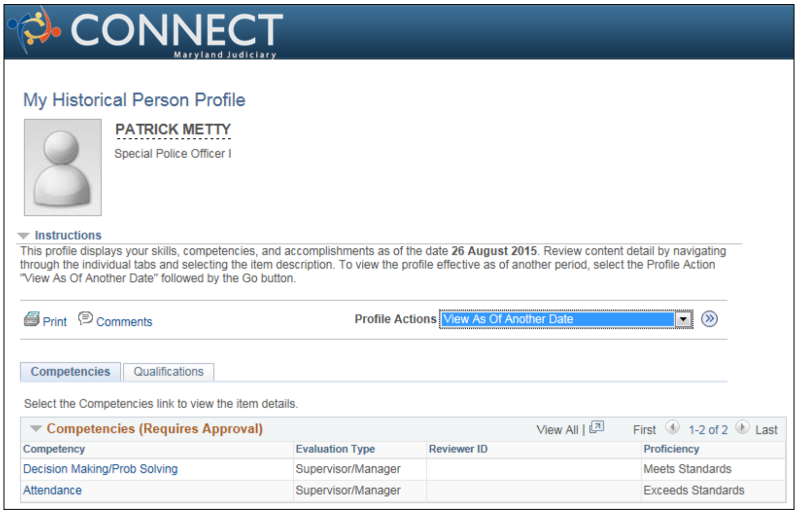
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**patrick.metty**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Learning and Development** menu. 	

Step	Action	Notes
9.	Click the **My Current Profile** menu. My Current Profile	
10.	Click the **Profile Actions** drop-down list. [Select Action]	
11.	Click the **Copy From Job Profile** list item. Copy From Job Profile	
12.	Click the **Go** button.	
13.	Click the **OK** button. OK	
14.	The competency "**Time Management**" was copied from your job profile and added to your current profile.	
15.	Click the **Edit** button for Time Management.	
16.	Click the **Proficiency** drop-down list.	
17.	Click the **Meets Standards** list item. Meets Standards	
18.	Click the **Vertical** scrollbar to move down the page.	
19.	Click the **OK** button. OK	
20.	Click the **Save** button. Save	
21.	Click the **Submit** button. Submit	
22.	Click the **OK** button. OK	
23.	Notice the competency "Time Management" is no longer displayed in the Competencies section. It has been submitted for approval.	
24.	Click the **4 item(s) pending approval** link. 4 item(s) pending approval	

Step	Action	Notes
25.	Here you can see that "Time Management" is displayed in the pending items for your profile. If approved by your manager, Time Management will be dispalyed as a competency on your profile.	
26.	Click the **Return to Previous Page** link. Return to Previous Page	
27.	Click the **Home** link. Home	
28.	Click the **Sign out** link. Sign out	
29.	You have completed the topic "Copying My Current Job Profile". **End of Procedure - Job Aid.**	

Viewing My Historical Profiles

Viewing historical profiles gives you the ability to view the attributes of your personal profile for a specific date in the past.



Procedure - Job Aid

In this topic, you will view your historical profiles.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**patrick.metty**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	

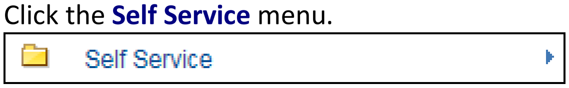
Step	Action	Notes
9.	Click the **My Historical Profile** menu. My Historical Profile	
10.	By default, CONNECT displays your competencies as of the current date. In this example, the current date is 08/26/2015. On 08/26/2015, Patrick had two competencies: Decision Making and Attendance. To view historical profile details, enter a date prior to the current date.	
11.	Click the **Profile Actions** drop-down list. [Select Action]	
12.	Click the **View As Of Another Date** list item. View As Of Another Date	
13.	Click the **Go** button.	
14.	Click in the **As Of Date** field. 08/26/2015	
15.	Press **[Backspace]**.	
16.	Enter "**06/01/2015**" into the **As Of Date** field.	
17.	Click the **OK** button. OK	
18.	Notice the Decision Making competency is no longer displayed. Patrick's only competency on 06/01/2015 was Attendance.	
19.	Click the **Qualifications** tab. Qualifications	
20.	Notice Patrick's qualifications did not change between 06/01/2015 and 08/26/2015.	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Viewing My Historical Profiles". **End of Procedure - Job Aid.**	

View Job Profiles and Express Interest

Expressing interest in job profiles lets your manager know which job(s) you are interested in so you can plan your career progression.

Procedure - Job Aid

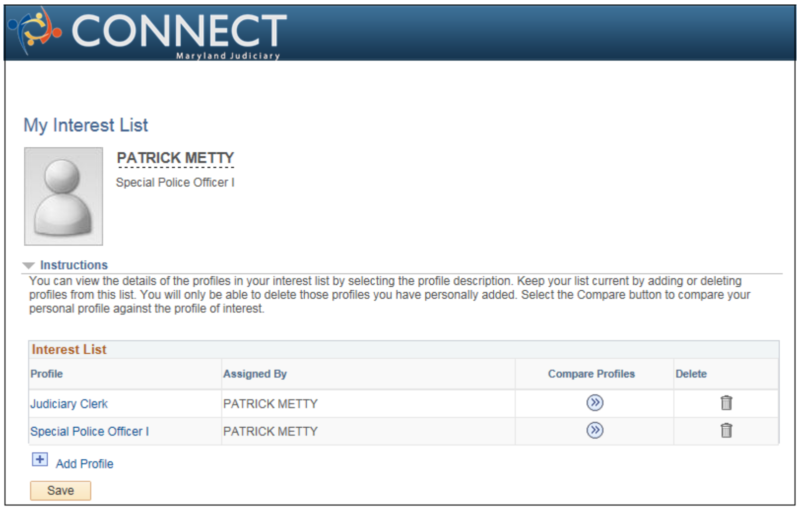
In this topic, you will view job profiles and express interest in becoming a judiciary clerk.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**patrick.metty**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Learning and Development** menu. 	

Step	Action	Notes
9.	Click the **View Job Profiles** menu. View Job Profiles	
10.	Click the **Search** button. Search	
11.	The search results display all profiles in CONNECT. When this topic was created, only two job profiles existed. In CONNECT, you will see more profiles.	
12.	Click the **Judiciary Clerk** link. Judiciary Clerk	
13.	You can click the Competencies, Qualifications, and Education tabs to view each attribute of the job profile.	
14.	Click the **Qualifications** tab. Qualifications	
15.	Click the **Vertical** scrollbar to move down the page.	
16.	Click the **Education** tab. Education	
17.	Click the **Profile Actions** drop-down list. [Select Action]	
18.	Click the **Express Interest** list item. Express Interest	
19.	Click the **Go** button.	
20.	Click the **OK** button. OK	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Viewing Job Profiles and Expressing Interest". **End of Procedure - Job Aid.**	

Viewing My Interest List

Once you have expressed interest in one or more job profiles, you can use your Interest List to view the profiles.



Procedure - Job Aid

In this topic, you will view the job profiles for which you have expressed an interest.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**patrick.metty**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	

Step	Action	Notes
9.	Click the **My Interest List** menu. My Interest List	
10.	Notice the Interest List displays two job profiles.	
11.	Click the **Compare** button for the Judiciary Clerk profile.	
12.	You can use the Profile Compare feature to compare your personal profile with the job profile in which you are interested. In this example, Patrick's profile does not meet any of the attributes for becoming a Judiciary Clerk.	
13.	Click the **View Content Section** drop-down list. <View All Sections>	
14.	Click the **Competencies** list item. Competencies	
15.	Click the **Return to Previous page** link. Return to Previous page	
16.	Click the **Save** button. Save	
17.	Click the **OK** button. OK	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Viewing My Interest List". **End of Procedure - Job Aid.**	

Searching & Comparing Profiles - Find Jobs

You can perform a job profile search in CONNECT based on profile criteria that you choose. It is important to note this feature allows you to search for existing job profiles within the Judiciary. This function is not the same as searching for open jobs through recruiting.

Procedure - Job Aid

In this topic, you will search for jobs based on specific job profile criteria that you select.

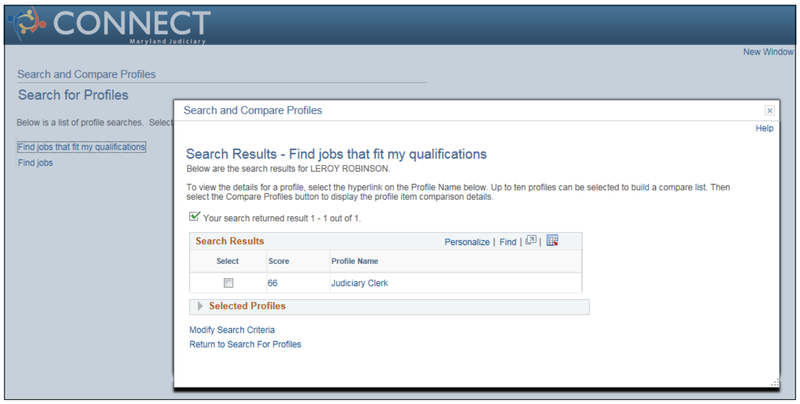
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lee.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Search and Compare Profiles** menu. Search and Compare Profiles	

Step	Action	Notes
10.	Click the **Find jobs** link. Find jobs	
11.	You can select search criteria from any of the 7 content sections.	
12.	Click the **Licenses and Certifications** link. Licenses and Certifications	
13.	Click the **Financial Disclosure** link. Financial Disclosure	
14.	Click the **Tests or Examinations** link. Tests or Examinations	
15.	Click the **Drug Screening** link. Drug Screening	
16.	Click the **Tests or Examinations** link. Tests or Examinations	
17.	Click the **Medical Examination** link. Medical Examination	
18.	Click the **Search** button. Search	
19.	In this example, Judiciary Clerk is the only job profile that met all 3 criteria that were entered.	
20.	Click the **Judiciary Clerk** link. Judiciary Clerk	
21.	Click the **Qualifications** tab. Qualifications	
22.	Click the **Vertical** scrollbar to move down the page.	
23.	Click the **Home** link. Home	
24.	Click the **Sign out** link. Sign out	
25.	You have completed the topic "Searching & Comparing Profiles - Find Jobs". **End of Procedure - Job Aid.**	

Searching & Comparing Profiles - Find Jobs that Fit my Qualifications

You can perform a job profile search in CONNECT based on your personal profile. The search criteria for the job profile are the attributes from your personal profile. Your search will return a job profile as long as at least 1 attribute from your profile matches the job profile.

It is important to note this feature allows you to search for existing job profiles within the Judiciary. This function is not the same as searching for open jobs through recruiting.



Procedure - Job Aid

In this topic, you will search for job profiles that match your personal profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lee.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Search and Compare Profiles** menu. Search and Compare Profiles	

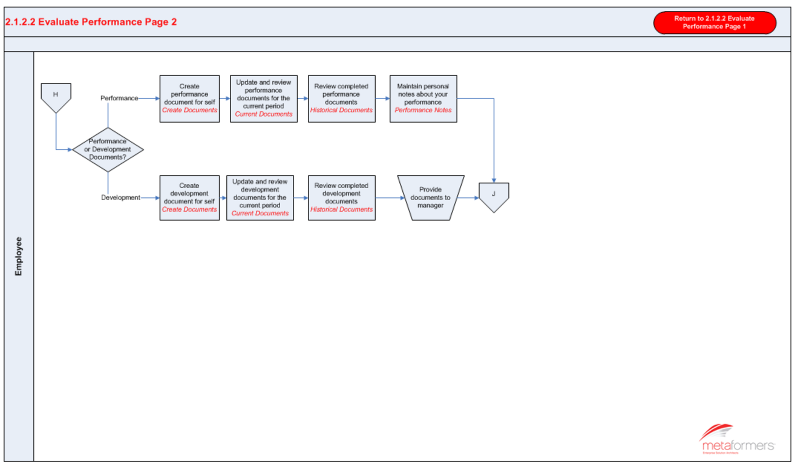
Step	Action	Notes
10.	Click the **Find jobs that fit my qualifications** link. Find jobs that fit my qualifications	
11.	Notice the score of 66. This indicates there is not a 100% match between your profile and the job profile for Judiciary Clerk. In order for a job profile to be displayed, your personal profile must match the job profile on at least 1 attribute.	
12.	Click the **Judiciary Clerk** link. Judiciary Clerk	
13.	Click the **Qualifications** tab. Qualifications	
14.	Click the **Vertical** scrollbar to move down the page.	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed the topic "Searching & Comparing Profiles - Find Jobs that Fit my Qualifications". **End of Procedure - Job Aid.**	

Evaluating Performance

CONNECT's performance evaluation process is designed to assess and plan your performance to meet current and future job requirements.

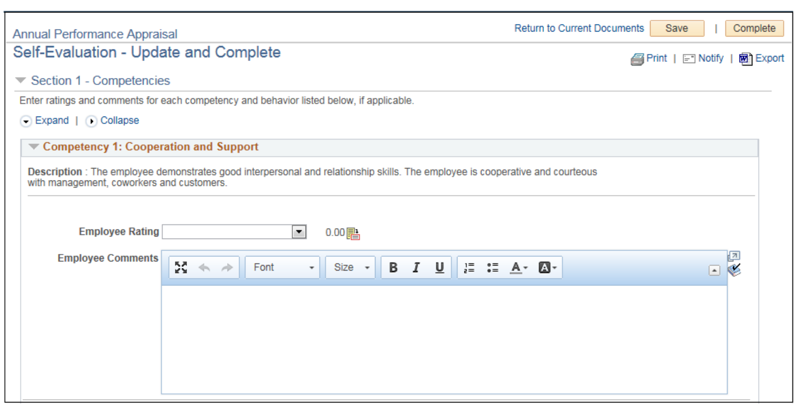
The performance evaluation process consists of 2 key components:

- The Annual Performance Appraisal
- The Performance Improvement Plan



Completing the Annual Performance Appraisal (Non-Manager Employee)

Employees can access online performance evaluation documents, complete their self-evaluation, and submit the appraisal for review and approval by their manager.



Procedure - Job Aid

In this topic, you will rate yourself on 5 competencies, enter comments to support your rating, and submit the evaluation for review and approval.

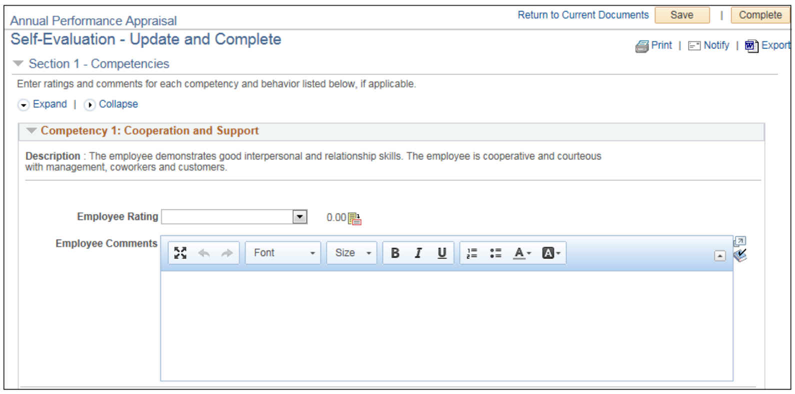
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**elizabeth.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **My Performance Documents** menu. My Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **Annual Performance Appraisal** link. Annual Performance Appraisal	
12.	Notice the steps instructing the employee to complete the self-evaluation by 12/26/15.	
13.	In this example, the indicator is yellow indicating the self-evaluation is not complete. The indicator will turn green when the self-evaluation is complete.	
14.	Click the **Expand** link to view all the competency details for this evaluation. Expand	
15.	Click the **Vertical** scrollbar to move down the page.	
16.	Click the **Employee Rating** drop-down list.	
17.	Click the **Meets Standards** list item. Meets Standards	

Step	Action	Notes
18.	Click in the **Employee Comments** field.	
19.	It is recommended that you enter comments to support each of your ratings. In the CONNECT system, you will type your comments into the Comments field. For the purposes of training however, comments to support this rating have been entered for you.	
20.	Click the **Vertical** scrollbar to move down the page.	
21.	Click the **Employee Rating** drop-down list.	
22.	Click the **Exceeds Standards** list item. Exceeds Standards	
23.	Click in the **Employee Comments** field.	
24.	Comments to support this rating have been entered for you.	
25.	Click the **Vertical** scrollbar to move down the page.	
26.	Click the **Employee Rating** drop-down list.	
27.	Click the **Meets Standards** list item. Meets Standards	
28.	Click in the **Employee Comments** field.	
29.	Comments to support this rating have been entered for you.	
30.	Click the **Vertical** scrollbar to move down the page.	
31.	Click the **Employee Rating** drop-down list.	
32.	Click the **Exceeds Standards** list item. Exceeds Standards	
33.	Click in the **Employee Comments** field.	
34.	Comments to support this rating have been entered for you.	
35.	Click the **Vertical** scrollbar to move down the page.	
36.	Click the **Employee Rating** drop-down list.	
37.	Click the **Exceeds Standards** list item. Exceeds Standards	
38.	Click in the **Employee Comments** field.	
39.	Comments to support this rating have been entered for you.	

Step	Action	Notes
40.	Click the **Calculate Rating** button in the Competencies Summary section.	
41.	Notice the overall rating was automatically calculated based on the ratings you assigned to each competency.	
42.	Click the **Vertical** scrollbar to move down the page.	
43.	Click in the **Employee Comments** field.	
44.	Comments to support the overall rating have been entered for you.	
45.	Click the **Save** button. Save	
46.	Click the **Complete** button. Complete	
47.	Click the **Confirm** button. Confirm	
48.	Notice the indicator is green indicating you have completed the self-evaluation.	
49.	Click the **View** link. View	
50.	Click the **Expand** link. Expand	
51.	Notice you can view the section details but cannot edit these details since it was submitted to your manager for review.	
52.	Click the **Vertical** scrollbar to move down the page.	
53.	Review the remaining details as desired.	
54.	Click the **Home** link. Home	
55.	Click the **Sign out** link. Sign out	
56.	You have completed the topic "Completing the Annual Performance Appraisal (Non-Manager Employee)". **End of Procedure - Job Aid.**	

Completing the Annual Performance Appraisal (Managerial Employee with Direct Reports)

Employees can access online performance evaluation documents, complete their self-evaluation, and submit the appraisal for review and approval by their manager.



Procedure - Job Aid

In this topic, you will rate yourself on 7 competencies, enter comments to support your rating, and submit the evaluation for review and approval.

Step	Action	Notes
1.	Enter "**ginger.lockhart**" into the **User ID** field.	
2.	Click in the **Password** field.	
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. Sign In	
5.	Click the **Main Menu** button. Main Menu	
6.	Click the **Self Service** menu. Self Service	
7.	Click the **Performance Management** menu. Performance Management	
8.	Click the **My Performance Documents** menu. My Performance Documents	

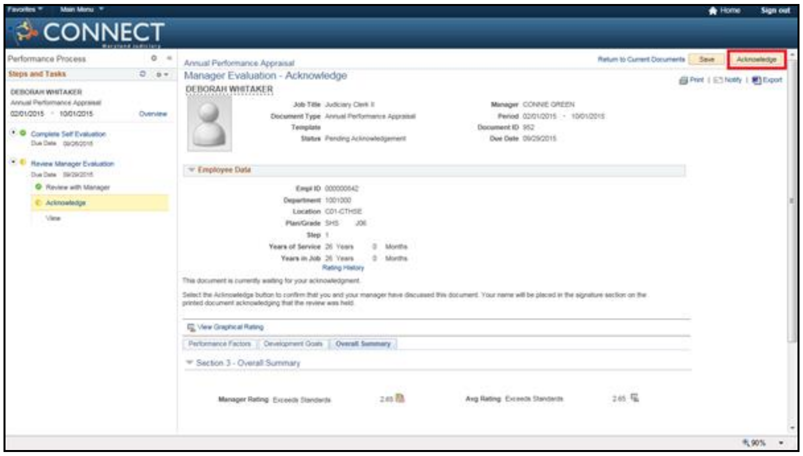
Step	Action	Notes
9.	Click the **Current Documents** menu. Current Documents	
10.	Click the **Annual Performance Appraisal** link. Annual Performance Appraisal	
11.	Notice the steps instructing the employee to complete the self-evaluation by 12/26/15.	
12.	In this example, the indicator is yellow indicating the self-evaluation is not complete. The indicator will turn green when the self-evaluation is complete.	
13.	Click the **Expand** link to view all the competency details for this evaluation. Expand	
14.	Click the **Vertical** scrollbar to move down the page.	
15.	Click the **Employee Rating** drop-down list.	
16.	Click the **Meets Standards** list item. Meets Standards	
17.	Click in the **Employee Comments** field.	
18.	It is recommended that you enter comments to support each of your ratings. In the CONNECT system, you will type your comments into the Comments field. For the purposes of training however, comments to support this rating have been entered for you.	
19.	Click the **Vertical** scrollbar to move down the page.	
20.	Click the **Employee Rating** drop-down list.	
21.	Click the **Exceeds Standards** list item. Exceeds Standards	
22.	Click in the **Employee Comments** field.	
23.	Comments to support this rating have been entered for you.	
24.	Click the **Vertical** scrollbar to move down the page.	
25.	Click the **Employee Rating** drop-down list.	

Step	Action	Notes
26.	Click the **Exceeds Standards** list item. Exceeds Standards	
27.	Click in the **Employee Comments** field.	
28.	Comments to support this rating have been entered for you.	
29.	Click the **Vertical** scrollbar to move down the page.	
30.	Click the **Employee Rating** drop-down list.	
31.	Click the **Meets Standards** list item. Meets Standards	
32.	Click in the **Employee Comments** field.	
33.	Comments to support this rating have been entered for you.	
34.	Click the **Vertical** scrollbar to move down the page.	
35.	Click the **Employee Rating** drop-down list.	
36.	Click the **Exceeds Standards** list item. Exceeds Standards	
37.	Click in the **Employee Comments** field.	
38.	Comments to support this rating have been entered for you.	
39.	Click the **Vertical** scrollbar to move down the page.	
40.	Click the **Employee Rating** drop-down list.	
41.	Click the **Meets Standards** list item. Meets Standards	
42.	Click in the **Employee Comments** field.	
43.	Comments to support this rating have been entered for you.	
44.	Click the **Vertical** scrollbar to move down the page.	
45.	Click the **Employee Rating** drop-down list.	
46.	Click the **Exceeds Standards** list item. Exceeds Standards	
47.	Click in the **Employee Comments** field.	
48.	Comments to support this rating have been entered for you.	

Step	Action	Notes
49.	Click the **Calculate Rating** button in the Competencies Summary section.	
50.	Notice the overall rating was automatically calculated based on the ratings you assigned to each competency.	
51.	Click in the **Employee Comments** field.	
52.	Comments to support the overall rating have been entered for you.	
53.	Click the **Save** button. Save	
54.	Click the **Complete** button. Complete	
55.	Click the **Confirm** button. Confirm	
56.	Notice the indicator is green indicating you have completed the self-evaluation.	
57.	Click the **View** link. View	
58.	Click the **Expand** link. Expand	
59.	Notice you can view the section details but cannot edit these details since it was submitted to your manager for review.	
60.	Click the **Vertical** scrollbar to move down the page.	
61.	Review the remaining details as desired.	
62.	Click the **Home** link. Home	
63.	Click the **Sign out** link. Sign out	
64.	You have completed the topic "Completing the Annual Performance Appraisal (Employee with Direct Reports)". **End of Procedure - Job Aid.**	

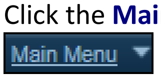
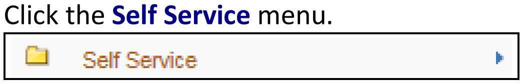
Reviewing & Acknowledging the Annual Performance Appraisal

Once the appraisal has been reviewed and updated by the Manager, the employee will confirm acknowledgement of the completed appraisal.



Procedure - Job Aid

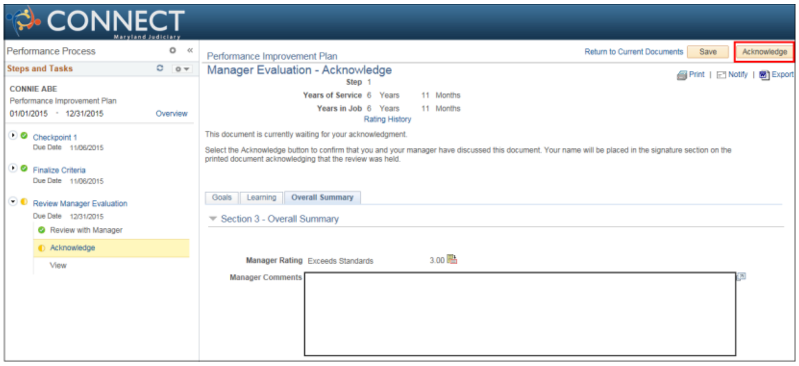
In this topic, you will review your manager's rating for your performance appraisal and acknowledge you have received the completed appraisal.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.whitaker**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	

Step	Action	Notes
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **My Performance Documents** menu. My Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **Annual Performance Appraisal** link. Annual Performance Appraisal	
12.	Notice the Overview section indicates you have completed the self-evaluation and your manager has reviewed and responded with their feedback.	
13.	Click the **Overall Summary** tab. Overall Summary	
14.	Review your manager's ratings.	
15.	Click the **Acknowledge** button to acknowledge you have received and reviewed the completed evaluation. Acknowledge	
16.	Click the **Confirm** button. Confirm	
17.	You have acknowledged your annual performance appraisal. Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the topic "Reviewing and Acknowledging the Annual Performance Appraisal". **End of Procedure - Job Aid.**	

Acknowledging the Performance Improvement Plan

Acknowledging your performance improvement plan (PIP).



Procedure - Job Aid

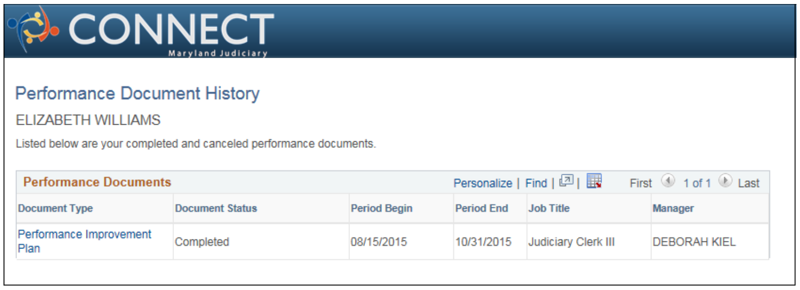
In this topic, you will review your Performance Improvement Plan and acknowledge that you have reviewed it with your manager.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.abe**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **My Performance Documents** menu. My Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	

Step	Action	Notes
11.	Click the **Performance Improvement Plan** link. Performance Improvement Plan	
12.	Notice the "Acknowledge" indicator is yellow. Once you have acknowledged the performance improvement plan, the indicator will turn green.	
13.	Click the **Vertical** scrollbar to move down the page.	
14.	Review the Manager Rating.	
15.	Click the **Learning** tab. Learning	
16.	Review the Manager Rating.	
17.	Click the **Overall Summary** tab. Overall Summary	
18.	Review the Manager Rating.	
19.	Click the **Acknowledge** button. Acknowledge	
20.	Click the **Confirm** button. Confirm	
21.	Notice the "Acknowledge" indicator is now green.	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the topic "Acknowledging the Performance Improvement Plan". **End of Procedure - Job Aid.**	

Reviewing Completed Performance Documents

Once a performance document is completed, it becomes a part of your performance history in CONNECT. You can view all your historical documents.


CONNECT
Maryland Judiciary

Performance Document History

ELIZABETH WILLIAMS

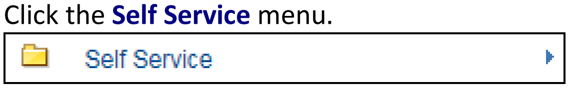
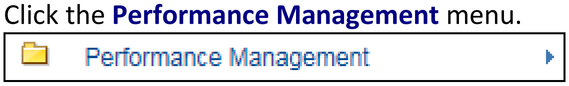
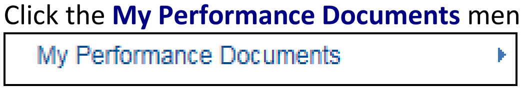
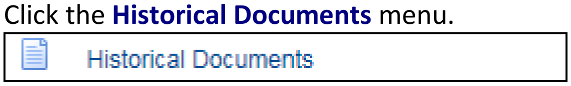
Listed below are your completed and canceled performance documents.

Performance Documents — Personalize | Find | First 1 of 1 Last

Document Type	Document Status	Period Begin	Period End	Job Title	Manager
Performance Improvement Plan	Completed	08/15/2015	10/31/2015	Judiciary Clerk III	DEBORAH KIEL

Procedure - Job Aid

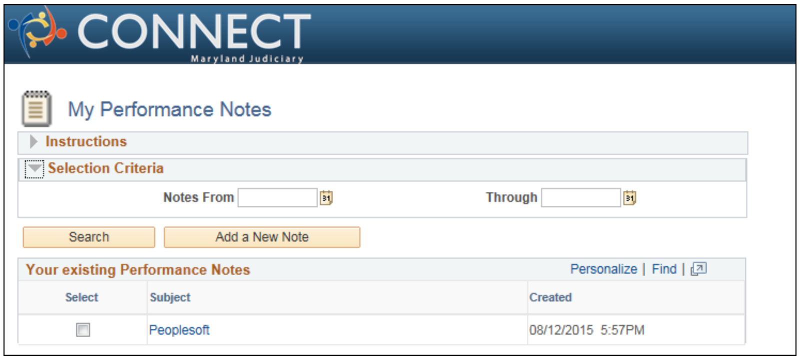
In this topic, you will review a completed performance improvement plan.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**elizabeth.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Performance Management** menu. 	
9.	Click the **My Performance Documents** menu. 	
10.	Click the **Historical Documents** menu. 	

Step	Action	Notes
11.	Once a document is completed, it becomes a part of your performance history. This page will show all your historical performance documents.	
12.	Click the **Performance Improvement Plan** link. Performance Improvement Plan	
13.	Click the **Expand** link. Expand	
14.	Click the **Vertical** scrollbar to move down the page.	
15.	Review the Manager Ratings.	
16.	Click the **Learning** tab. Learning	
17.	Review the Manager Ratings.	
18.	Click the **Overall Summary** tab. Overall Summary	
19.	Review the Manager Ratings.	
20.	Click the **Return to Performance Documents History** link. Return to Performance Documents History	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Reviewing Completed Performance Documents". **End of Procedure - Job Aid.**	

Managing Employee Performance Notes

Throughout the evaluation period, you can create a record of events, activities, and accomplishments that you can later use when completing your performance evaluation.



Procedure - Job Aid

In this topic, you will enter performance notes that you can later use to complete your evaluation.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**elizabeth.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Notes** menu. Performance Notes	
10.	You can add a new note or review and edit an existing note.	

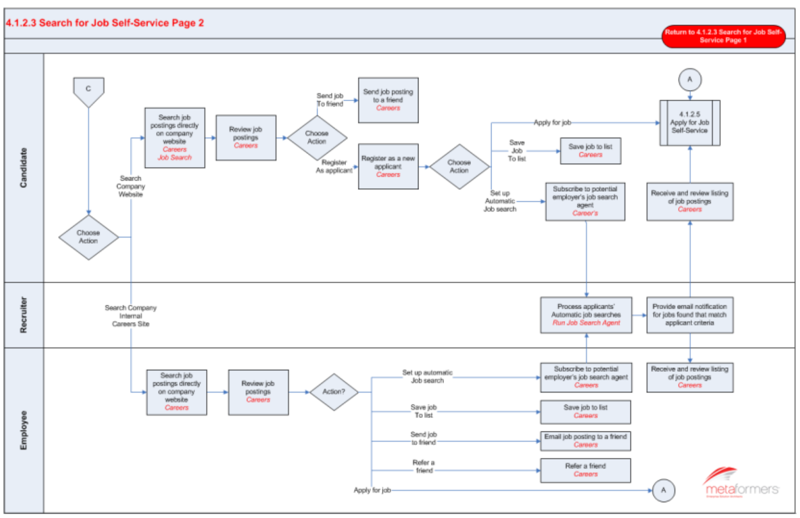
Step	Action	Notes
11.	Click the **Add a New Note** button. Add a New Note	
12.	Click in the **Subject** field.	
13.	Enter "**Overtime**" into the **Subject** field.	
14.	Click in the **Note Text** field.	
15.	Enter your performance notes in the Note Text field. For this example, the notes have been entered for you.	
16.	Click the **Save** button. Save	
17.	Click the **Return to Performance Note Selection** link. Return to Performance Note Selection	
18.	Click the **Peoplesoft** link. Peoplesoft	
19.	Review the existing notes.	
20.	Click the **Home** link. Home	
21.	Click the **Sign out** link. Sign out	
22.	You have completed the topic "Managing Employee Performance Notes". **End of Procedure - Job Aid.**	

Applying for Jobs

Through CONNECT self-service, employees can view job postings and apply for jobs online.

Upon completion of this module, you will be able to:

- Apply for a job
- Save job search criteria
- Save jobs to favorites
- Withdraw an application
- Accept or reject a job offer
- Send a job to a friend
- Refer a friend
- Notify applicants of jobs



Searching and Applying for a Job-Employee

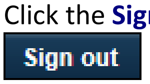
Procedure - Job Aid

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	
9.	Click the **Careers** menu. Careers	
10.	Click in the **Keywords** field.	
11.	Enter "**Clerk**" into the **Keywords** field.	
12.	Click the **Search** button. Search	
13.	Click the **Vertical** scroll bar to move down the page.	
14.	Click the **Judiciary Clerk - 1010** link. Judiciary Clerk II - 1010	
15.	Click the **Apply** button. Apply	
16.	Click the **Checkbox** indicating you have read and agreed to the above terms and agreements.	
17.	Click the **Next** button. Next	
18.	When applying for a job, you can attach a resume, copy and paste your resume, or apply without a resume. Please note that if you attach or paste your existing resume, you will still be guided through each section of the application (education, work experience, etc.) to enter your details.	
19.	Click the **Apply without a resume** object.	
20.	Click the **Next** button. Next	

Step	Action	Notes
21.	Click the **Add Degrees** button.	
22.	Click in the **Date Acquired** field.	
23.	Press **[Backspace]**.	
24.	Enter "**05/31/2005**" into the **Date Acquired** field.	
25.	Click in the **Degree** field.	
26.	Enter "**bs**" into the **Degree** field.	
27.	Click the **BS** object.	
28.	Click the **Save** button.	
29.	Click the **Next** button.	
30.	Click the **Add Work Experience** button.	
31.	Enter "**03/13/2006**" into the **Start Date** field.	
32.	Click in the **Employer** field.	
33.	Enter "**Admin Office of the Courts**" into the **Employer** field.	
34.	Click in the **Ending Job Title** field.	
35.	Enter "**Employee Relations Clerk**" into the **Ending Job Title** field.	
36.	Click in the **Supervisor** field.	
37.	Enter "**Davy Glenn**" into the **Supervisor** field.	
38.	Click in the **Supervisor Email** field.	
39.	Enter "**davy.glenn@aoc.gov**" into the **Supervisor Email** field.	
40.	Click in the **Supervisor Phone** field.	
41.	Enter "**410-260-0000**" into the **Supervisor Phone** field.	
42.	The "OK to contact" checkbox will be auto selected.	

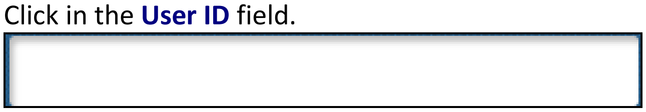
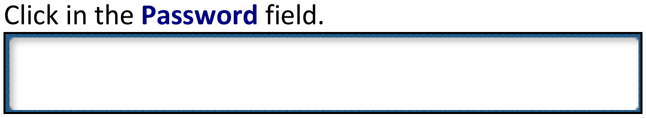
Step	Action	Notes
43.	Click in the **Description** field.	
44.	Enter "**Employee Relations Clerk duties as assigned."** into the **Description** field.	
45.	Click the **Save** button. Save	
46.	Click the **Next** button. Next	
47.	Not all Job IDs will have the same questionnaire. Some may have only one question, some may have up to five questions. In this example, there is only one question.	
48.	Click the **Yes** option.	
49.	Click the **Next** button. Next	
50.	Click the button to the right of the **How did you learn of the job?** field.	
51.	Click the **Posting** list item. Posting	
52.	Click the **Next** button. Next	
53.	Click the **Add Reference** button. Add Reference	
54.	The "Add Reference" page will auto populate the Reference Type to "Professional". Please make the correct selection for "Reference Type".	
55.	Enter "**Joan Daewood**" into the **Reference Name** field.	
56.	Click in the **Title** field.	
57.	Enter "**Manager**" into the **Title** field.	
58.	Click in the **Employer** field.	
59.	Enter "**Acme Company**" into the **Employer** field.	
60.	Click in the **Phone** field.	

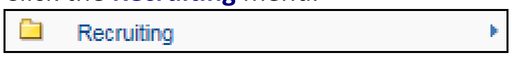
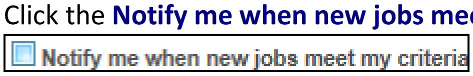
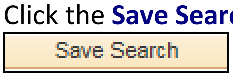
Step	Action	Notes
61.	Enter "**410-555-6632**" into the **Phone** field.	
62.	Click in the **Email Address** field. 	
63.	Enter "**joan.daewood@123.com**" into the **Email Address** field.	
64.	Click the **Save** button. 	
65.	Click the **Next** button. 	
66.	Click the **Vertical** scroll bar to move down the page and review application.	
67.	Click the **Submit Application** button. 	
68.	Once you have submitted your application, CONNECT will not allow you to edit it for that Job ID.	
69.	Click the **Home** link. 	
70.	Click the **Sign out** link. 	
71.	You have completed the topic "Applying for a Job-Employee". **End of Procedure - Job Aid.**	

Save Job Search Criteria

Procedure - Job Aid

In this topic, you will search for a job and save your search criteria to be used at a later date.

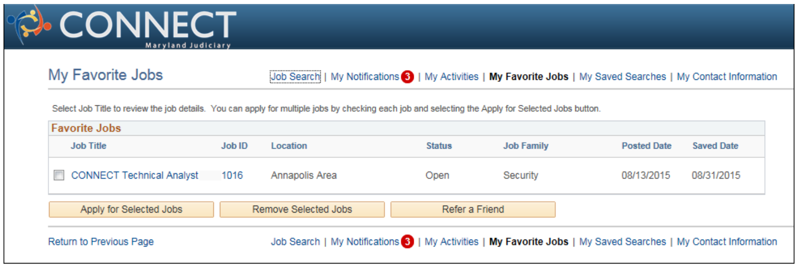
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**jennifer.northcraft**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Recruiting** menu. 	
9.	Click the **Careers** menu. 	
10.	Enter "**clerk iii**" into the **Keywords** field.	
11.	Click the **Search** button. 	
12.	Click the **Save Search** button. 	
13.	Notice there is an existing search that was created at a different time.	
14.	Click in the **Name My Search** field. 	
15.	Enter "**Clerk III**" into the **Name My Search** field.	
16.	You can choose to be notified when a new job is posted that meets your search criteria.	
17.	Click the **Notify me when new jobs meet my criteria** checkbox. 	
18.	Your email will populate automatically when you select the Notify me checkbox.	
19.	Click the **Save Search** button. 	
20.	There are now 2 searches saved.	
21.	To access your saved searches later, click the My Saved Searches link. This link is visible on most of the Career pages in CONNECT.	
22.	Click the **Home** link. 	

Step	Action	Notes
23.	Click the **Sign out** link. 	
24.	You have completed the topic "Save a Job Search Criteria". **End of Procedure - Job Aid.**	

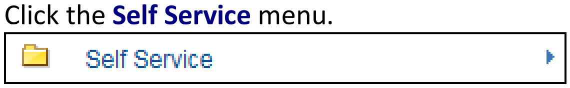
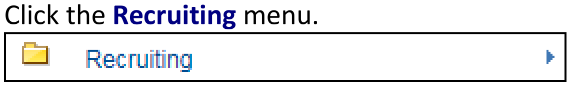
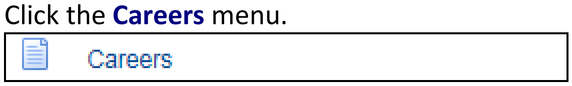
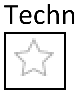
Saving Jobs to Favorites

CONNECT allows you to save your favorite jobs.



Procedure - Job Aid

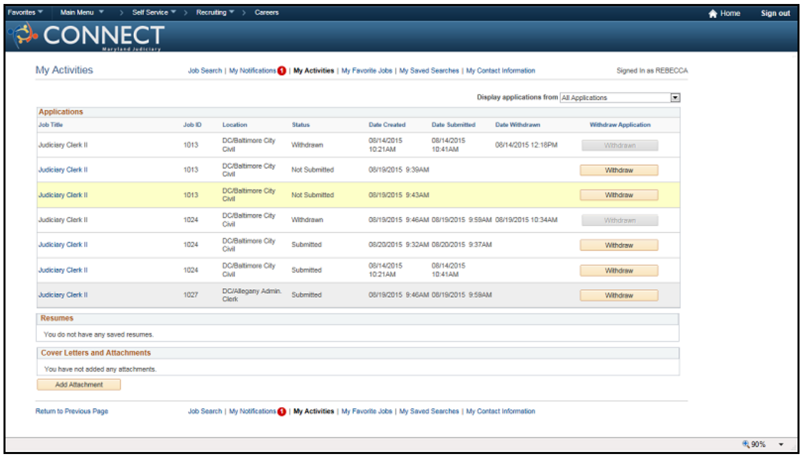
In this topic, you will save a job to your Favorites.

Step	Action	Notes
1.	Enter "**isha.beazer**" into the **User ID** field.	
2.	Click in the **Password** field.	
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. 	
5.	Click the **Main Menu** button. 	
6.	Click the **Self Service** menu. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Careers** menu. 	
9.	Click the **Vertical** scrollbar to move down the page.	
10.	Click the **Add to My Favorite Jobs** button for the CONNECT Technical Analyst position. 	
11.	When selected and added to your Favorites, the Star turns yellow.	

Step	Action	Notes
12.	Click the **My Favorite Jobs** link. My Favorite Jobs	
13.	Notice the job saved to your Favorites.	
14.	To access your Favorite jobs later, click the My Favorite Jobs link. This link is visible on most of the Career pages in CONNECT.	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed the topic "Saving Jobs to Favorites". **End of Procedure - Job Aid.**	

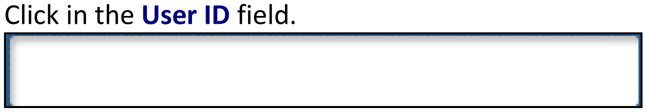
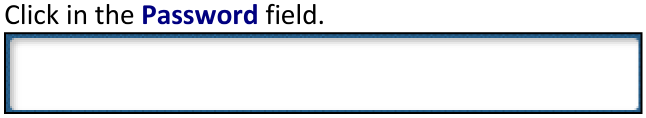
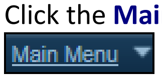
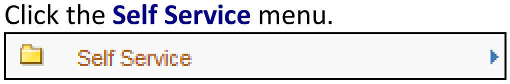
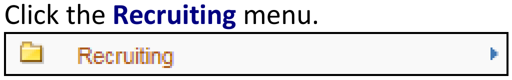
Withdrawing Your Job Application

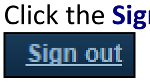
If you no longer wish to be considered for a job, you can withdraw your application.



Procedure - Job Aid

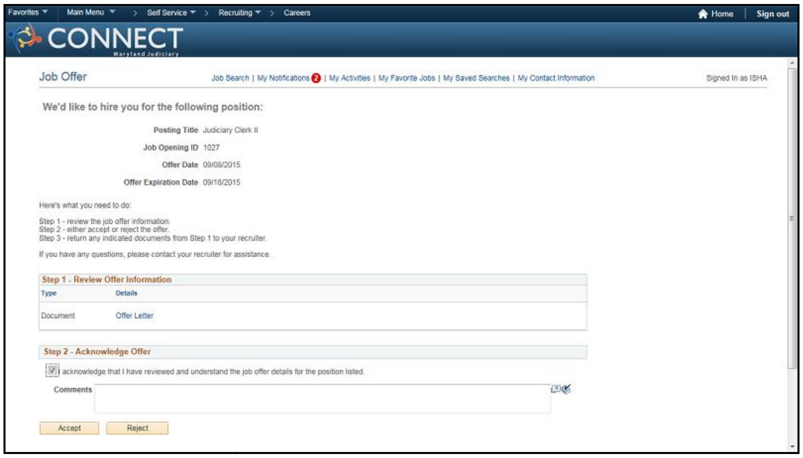
In this topic, you will withdraw an application that you previously created.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**rebecca.miller**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Recruiting** menu. 	

Step	Action	Notes
9.	Click the **Careers** menu. 	
10.	Click the **My Activities** link. 	
11.	The "My Activities" page displays your applications and their current statuses.	
12.	Click the **Withdraw** button for the specific job in which you want to withdraw. 	
13.	Click the **OK** button. 	
14.	Notice the status of the application is now withdrawn.	
15.	Click the **Home** link. 	
16.	Click the **Sign out** link. 	
17.	You have completed the topic "Withdrawing Your Job Application". **End of Procedure - Job Aid.**	

Accepting or Rejecting a Job Offer

You will receive a notification if a job offer is extended by the AOC. From within CONNECT, you can view the offer letter, acknowledge that you have reviewed the offer, and accept or reject the offer.



Procedure - Job Aid

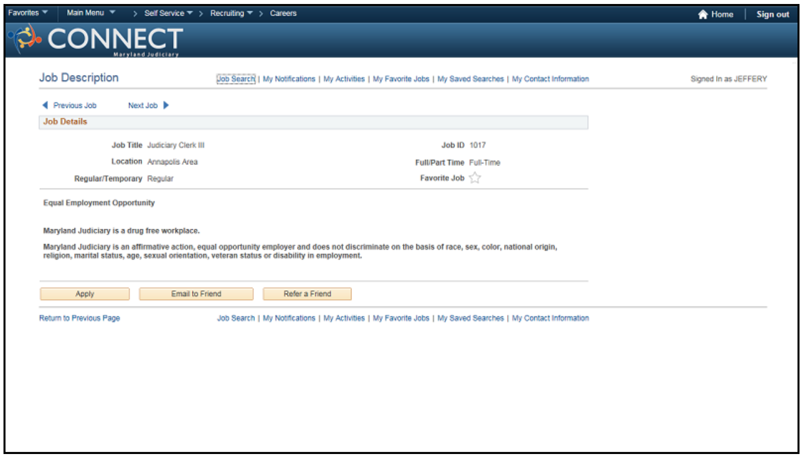
In this topic, you will accept a job offer.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**isha.beazer**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	

Step	Action	Notes
9.	Click the **Careers** menu. Careers	
10.	Click the **My Notifications** link. My Notifications 3	
11.	If you have received a job offer, you will see a job offer notification	
12.	Click the **You have a job offer: Judiciary Clerk II (Job ID 1027)** link. You have a job offer: Judiciary Clerk II (Job ID 1027)	
13.	To view the details of the job offer, click the **Offer Letter** link. Offer Letter	
14.	Click the **Open** button to open the offer letter attachment. Open	
15.	In this example, the offer letter opened in Microsoft Word. You can save, print, or close the document as desired.	
16.	Click the **Close (X)** button to close the document when you are finished. ✕	
17.	Click the **Acknowledgement** checkbox.	
18.	At this point, you can either Accept or Reject the job offer.	
19.	For this example, click the **Accept** button. Accept	
20.	Click the **OK** button. OK	
21.	Notice the message indicating you have accepted the offer.	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the topic "Accepting or Rejecting a Job Offer". **End of Procedure - Job Aid.**	

Sending a Job to a Friend

Send a job opening to a friend.



Procedure - Job Aid

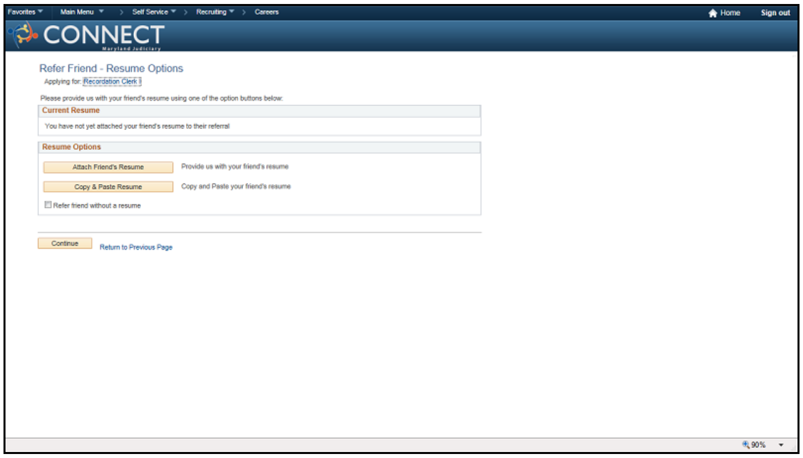
In this topic, you will email a job opening to a friend.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	
9.	Click the **Careers** menu. Careers	
10.	Select the job you want to send to a friend.	

Step	Action	Notes
11.	Click the **Vertical** scrollbar to move down the page.	
12.	Click the **Judiciary Clerk III - 1017** link. Judiciary Clerk III - 1017	
13.	Click the **Email to Friend** button. Email to Friend	
14.	Click in the **To** field.	
15.	Enter "**lilly.jones@email.com**" into the **To** field.	
16.	Click the **Send** button. Send	
17.	Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the topic "Sending a Job to a Friend". **End of Procedure - Job Aid.**	

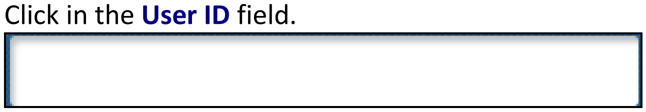
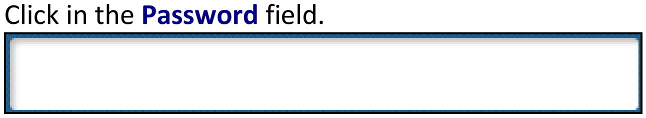
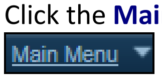
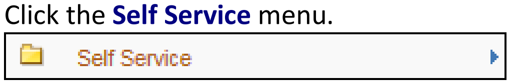
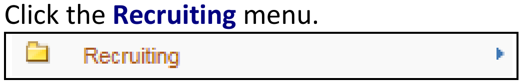
Referring Friends by Providing Contact Info and Resume

CONNECT allows you to refer friends for specific jobs within the Judiciary. To refer a friend, simply select the job, include a resume if you have one, enter your friend's contact information, and submit the referral.



Procedure - Job Aid

In this topic, you will refer a friend to an AOC recruiter for a specific job.

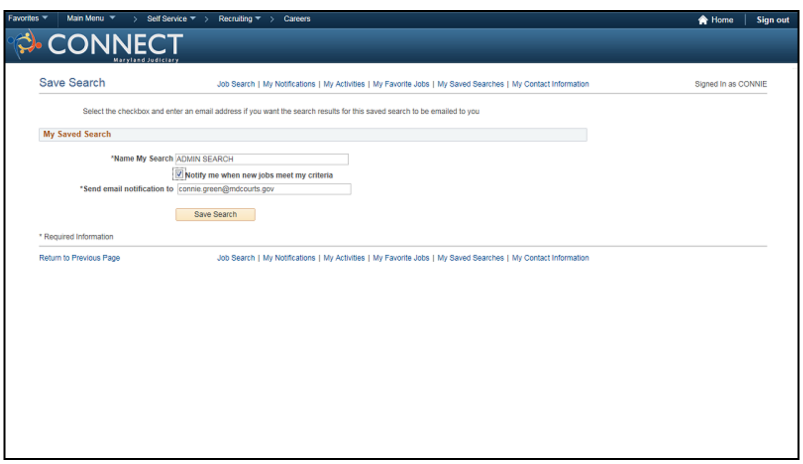
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**jennifer.northcraft**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Recruiting** menu. 	

Step	Action	Notes
9.	Click the **Careers** menu. Careers	
10.	Select the job for which you are referring your friend.	
11.	Click the **Recordation Clerk I - 1019** option.	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	Click the **Refer a Friend** button. Refer a Friend	
14.	You can refer a friend with or without their resume. In this example, you will attach your friend's resume.	
15.	Click the **Attach Friend's Resume** button. Attach Friend's Resume	
16.	Click the **Browse** button to browse to the location where your friend's resume is located. Browse...	
17.	Click the **SusanSmith-Resume** list item.	
18.	Click the **Open** button. Open	
19.	Click the **Upload** button. Upload	
20.	Notice Susan's resume is attached.	
21.	Click the **Continue** button. Continue	
22.	Enter your friend's primary contact information.	
23.	Click in the **First Name** field.	
24.	Enter "**Susan**" into the **First Name** field.	
25.	Click in the **Last Name** field.	
26.	Enter "**Smith**" into the **Last Name** field.	
27.	Click in the **Email Address** field.	
28.	Enter "**susansmith12@email.com**" into the **Email Address** field.	

Step	Action	Notes
29.	Click the **Email Type** drop-down list. Select...	
30.	Click the **Home** list item. Home	
31.	Click the **Save and Submit** button. Save and Submit	
32.	Notice the message indicating you have successfully referred your friend for a job.	
33.	Click the **Home** link. Home	
34.	Click the **Sign out** link. Sign out	
35.	You have completed the topic "Referring Friends by Providing Contact Info and Resume". **End of Procedure - Job Aid.**	

Notify Applicants of Jobs

When creating and saving a job search in CONNECT, you can indicate that you want the system to notify you by email if a new job is posted that meets your search criteria.



Procedure - Job Aid

In this topic, you will save a job search and indicate that you want to be notified by email if a new job is posted that meets your job search criteria.

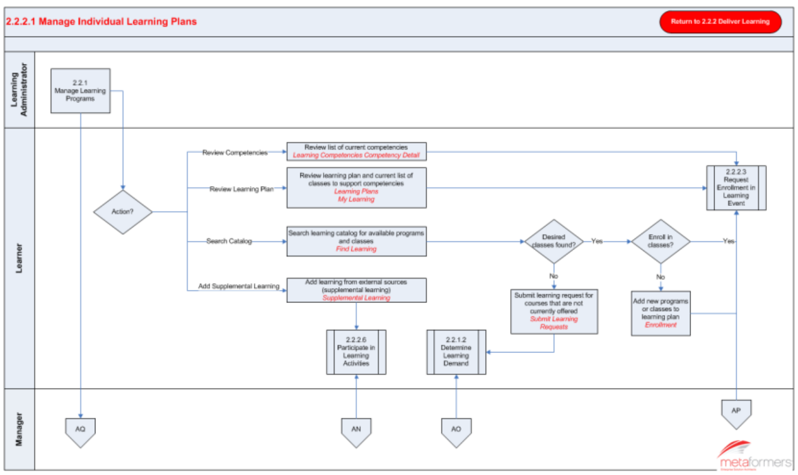
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	
9.	Click the **Careers** menu. Careers	
10.	Click in the **Keywords** field.	
11.	Enter **"Administrative"** into the **Keywords** field.	
12.	Click the **Search** button. Search	
13.	Click the **Save Search** button. Save Search	
14.	Click in the **Name My Search** field.	
15.	Enter "**Admin Search**" into the **Name My Search** field.	
16.	Click the **Notify me when new jobs meet my criteria** checkbox. Notify me when new jobs meet my criteria	
17.	When a new job is posted that meets your job search criteria, you will be notified by email about the job posting. In this example, a new job posting containing the keyword "Administrative" will trigger the notification.	
18.	Notice when you click the "Notify me" checkbox, your email address automatically appears in the email notification field.	
19.	Click the **Save Search** button. Save Search	

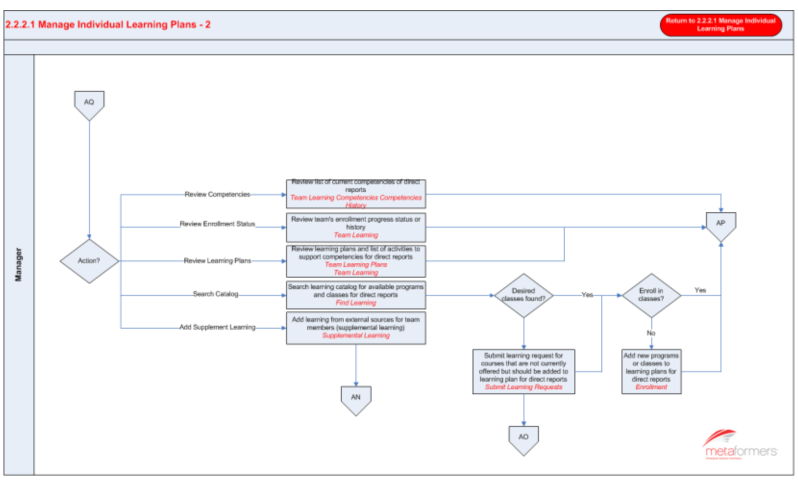
Step	Action	Notes
20.	Click the **Home** link.  	
21.	Click the **Sign out** link.  	
22.	You have completed the topic "Notify Applicants of Jobs". **End of Procedure - Job Aid.**	

Managing Education and Training

Planned Learning

CONNECT's learning plan function allows you, your manager, or a learning administrator to assign learning to you in a planned state. This means that the learning will take place at some point in the future. The attributes for each item on your learning plan, such as status, priority, and target completion date, can be defined and updated.

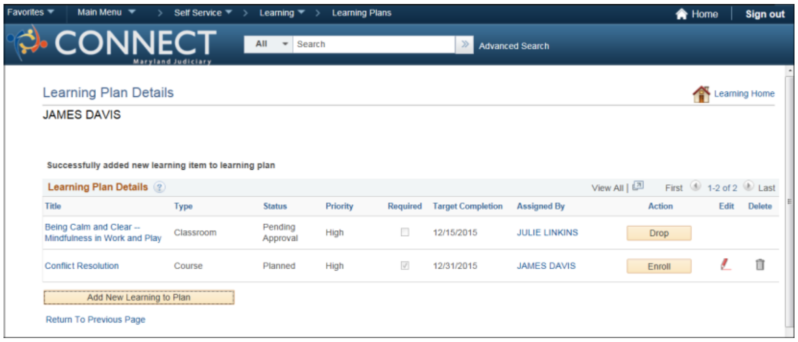




Adding a Course to Learning Plan

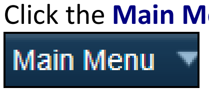
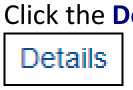
Learning plans are used to guide learners down a defined learning path. Learning plans can be created and updated by learners through self-service, by managers through manager self-service, and by learning administrators.

Learning plans can consist of items in the learning catalog such as courses, classes, and programs. When these items are added to the plan, you can specify a target completion date and priority for each item. You can also indicate whether the items are required or not.



Procedure - Job Aid

In this topic, you will add a course to your learning plan.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **Learning Plans** menu.	
10.	Every learner in CONNECT has a default learning plan titled My Learning Plan. You can use this learning plan or create a new one. For this example, you will add a course to the default learning plan.	
11.	Click the **Details** link. 	

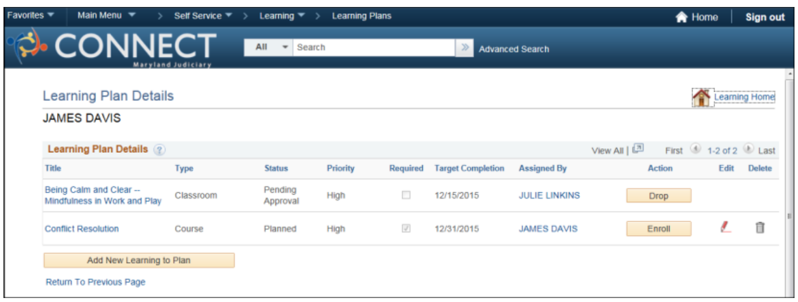
Step	Action	Notes
12.	Notice James Davis already has a course on his learning plan that was assigned by Julie Linkins. In this example, you will add a second course to the learning plan.	
13.	Click the **Add New Learning to Plan** button. Add New Learning to Plan	
14.	Click the **Advanced Search** link. Advanced Search	
15.	Click in the **Title** field.	
16.	Enter "**conflict**" into the **Title** field.	
17.	Click the **Search** button. Search	
18.	Click the **Vertical** scrollbar to move down the page.	
19.	Click the **Select** button. Select	
20.	When self-assigning a course to your learning plan, you can enter the target completion date for the course, set the priority (high, medium, low), and indicate whether the course is required.	
21.	Click in the **Target Completion** field.	
22.	Enter "**12/31/2015**" into the **Target Completion** field.	
23.	Click the **Priority** drop-down list. Low	
24.	Click the **High** list item. High	
25.	Click the **Required** option.	
26.	Click the **Save** button. Save	
27.	Notice Conflict Resolution has been added to the learning plan.	
28.	Click the **Home** link. Home	

Step	Action	Notes
29.	Click the **Sign out** link. **Sign out**	
30.	You have completed the course "Adding a Course to Planned Learning". **End of Procedure - Job Aid.**	

Enrolling into a Course from Your Learning Plan

Learning plans are used to guide learners down a defined learning path. Learning plans can be created and updated by learners through self-service, by managers through manager self-service, and by learning administrators.

Once a course has been added to your learning plan, you can enroll into that course directly from the learning plan.



Procedure - Job Aid

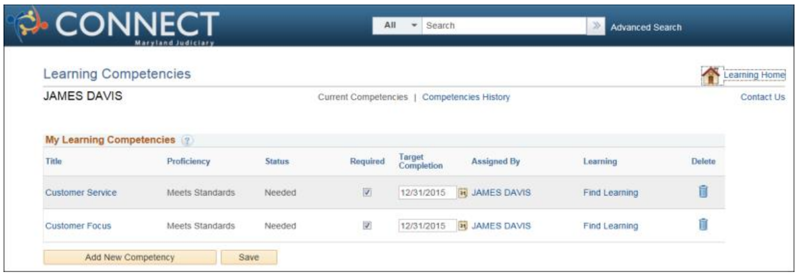
In this topic, you will enroll into a Conflict Resolution course from your learning plan.

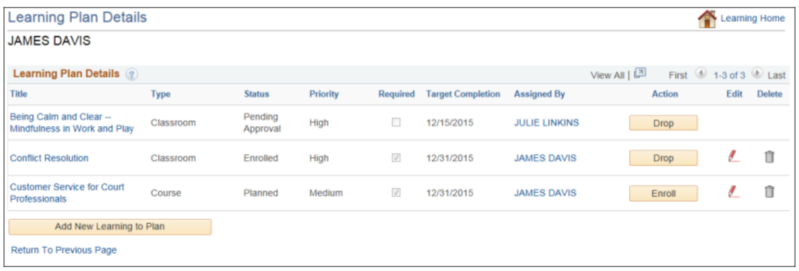
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	

Step	Action	Notes
9.	Click the **Learning Plans** menu.	
10.	Click the **Details** link to view the items on your learning plan. Details	
11.	Click the **Enroll** button for the Conflict Resolution course. Enroll	
12.	Click the **Enroll** button. Enroll	
13.	Click the **Submit Enrollment** button. Submit Enrollment	
14.	Notice the message indicating the enrollment requires approval.	
15.	Click the **Learning Home** link. Learning Home	
16.	Click the **My Learning** link. My Learning	
17.	Conflict Resolution is displayed on your "My Learning" page with a status of Pending Approval.	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Enrolling into a Course from Your Learning Plan". **End of Procedure - Job Aid.**	

Adding a Learning Competency, Finding Associated Course, and Adding to Plan

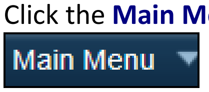
AOC has identified learning activities designed to meet the competencies needed for you to be successful in your job role. Competencies can be assigned to your learning profile by you, your manager, or by a learning administrator. Once a competency has been assigned to your profile, you can find learning activities in CONNECT that satisfy those competencies as you complete the learning.





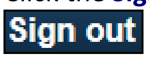
Procedure - Job Aid

In this topic, you will add a learning competency to your profile, find the associated course needed to satisfy the competency, and add the course to your learning plan.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu.	

Step	Action	Notes
8.	Click the **Learning** menu.	
9.	Click the **Learning Competencies** menu.	
10.	Notice James only has one competency assigned to his profile; Customer Focus.	
11.	Click the **Add New Competency** button to assign a second competency. Add New Competency	
12.	Click in the **Competency** field.	
13.	Enter "**customer service**" into the **Competency** field.	
14.	Click the **Search** button. Search	
15.	Click the **Select** checkbox next to Customer Service.	
16.	Click the **Proficiency** drop-down list for the Customer Service competency.	
17.	Click the **Meets Standards** list item. Meets Standards	
18.	Click in the **Target Completion Date** field.	
19.	Enter "**12/31/2015**" into the **Target Completion Date** field.	
20.	Click the **Required** box next to the Target Completion Date.	
21.	Click the **Add** button. Add	
22.	Notice the competency "Customer Service" has been added to James' competency profile.	
23.	Click the **Find Learning** link for the Customer Service competency. Find Learning	

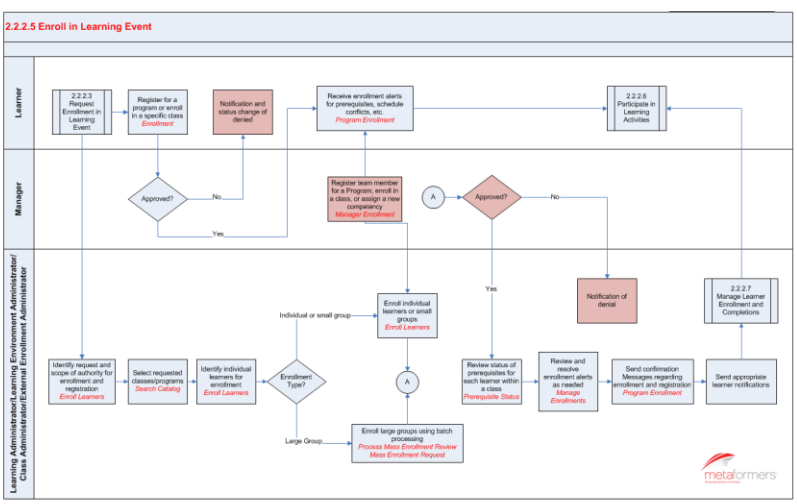
Step	Action	Notes
24.	When you click "Find Learning" from a specific competency, CONNECT will ONLY display courses or programs that are mapped to the selected competency. In this example, Customer Service for Court Professionals is the only item in the catalog that satisfies the Customer Service competency.	
25.	Notice you have the option to add this course to your learning plan or to enroll into the class. For this example, you will add the course "Customer Service for Court Professionals" to your learning plan.	
26.	Click the **Plan for Later** button. Plan for Later	
27.	Click in the **Target Completion** field.	
28.	Enter "**12/31/2015**" into the **Target Completion** field.	
29.	Click the **Priority** drop-down list. Low	
30.	Click the **Medium** list item. Medium	
31.	Click the **Required** box.	
32.	Click the **Save** button. Save	
33.	Notice the message indicating "Customer Service for Court Professionals" has been added to your plan.	
34.	Click the **Home** link. Home	
35.	Click the **Main Menu** button. Main Menu	
36.	Click the **Self Service** menu.	
37.	Click the **Learning** menu.	
38.	Click the **Learning Plans** menu.	
39.	Click the **Details** link for "My Learning Plan". Details	

Step	Action	Notes
40.	Notice the course "Customer Service for Court Professionals" has been added to your learning plan. After you complete the course, the competency will be met.	
41.	Click the **Home** link.  	
42.	Click the **Sign out** link.  	
43.	You have completed the topic "Adding a Learning Competency, Finding Associated Course, and Adding to Plan". **End of Procedure - Job Aid.**	

Enrolling into Learning Activities

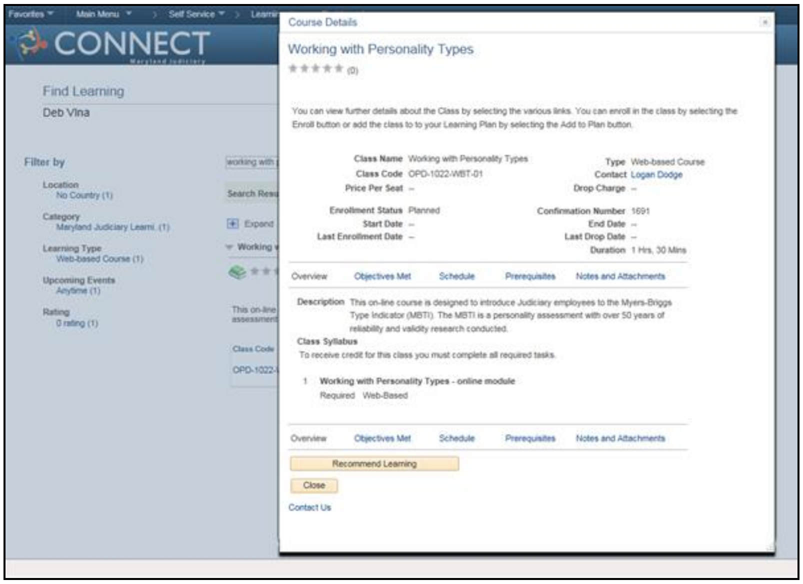
Before you can attend a course or complete a program, you must enroll in the activity or register for the program. The term enrollment is used for courses and the term registration is used for programs. This distinction is important. Courses require that you only enroll into a course whereas programs require you to register for the program first then enroll into the courses that define the program.

CONNECT allows you to self-enroll and register into learning events, managers to enroll and register their team members into learning events, or learning administrators to enroll and register anyone into learning events. It is important to note that all enrollment requests require approval from your manager before you can attend the learning event.



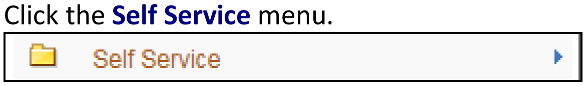
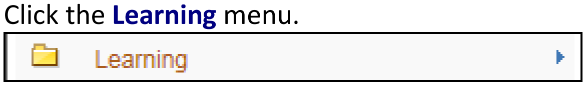
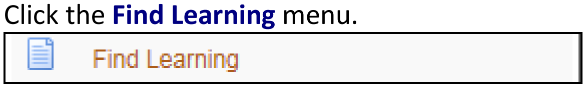
Searching the Learning Catalog & Enrolling in a Class

Search the catalog for available courses and enroll into a class.



Procedure - Job Aid

In this topic, you will search for courses in the learning catalog and enroll into a class.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Learning** menu. 	
9.	Click the **Find Learning** menu. 	

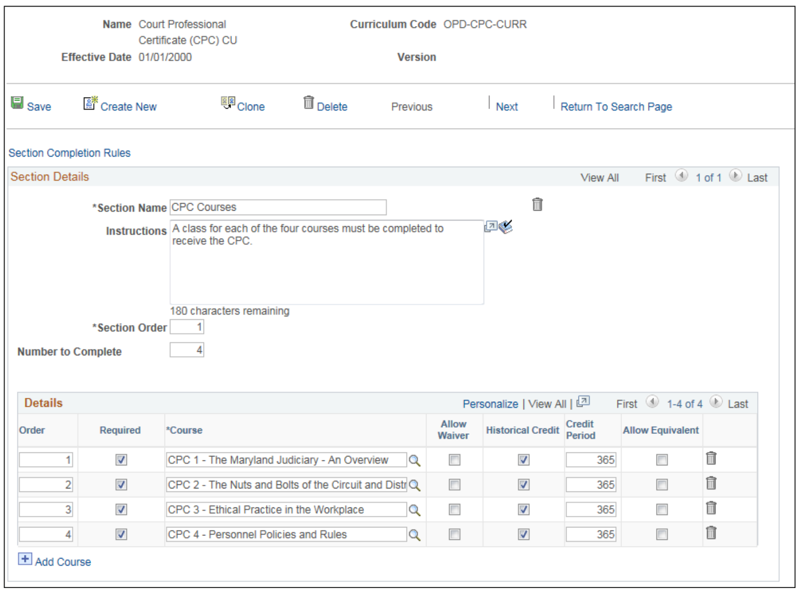
Step	Action	Notes
10.	The learning catalog consists of courses, classes, and programs. A **course** represents a specific topic of study. A **class** is an offering of a course. A **program** represents a significant learning goal that can be achieved by completing multiple classes. By default, the Find Learning page displays the first 15 courses/programs you have access to view. To view additional items, you can click the right arrow or the "View All" link. In this example, you have access to a total of 48 courses and programs.	
11.	To narrow your search results, you can apply a filter or perform a keyword search.	
12.	Filters are displayed on the left side of the page indicating the number of class offerings available within each filter.	
13.	Click the **Classroom (3)** link to view courses with the learning type of classroom. Classroom (3)	
14.	2 courses containing 3 classes are displayed after applying the filter. Note: The third class is not visible in this screen.	
15.	To search by keyword, click in the **Search by keyword** field.	
16.	Enter "**being calm**" into the **Search** field.	
17.	Click the **Search** button. 	
18.	Note: Only courses containing the keywords "being calm" are displayed.	
19.	Available classes are listed below the course title. The class details include Class Code, Type, Duration, Start Date, and Location. Some courses may have multiple class offerings.	
20.	To view the class details, click the class code link. For this example, click the **OPD-1001-2015-08-27** link. OPD-1001-2015-08-27	

Step	Action	Notes
21.	Click the **Vertical Scrollbar** to scroll down the page and view all class details.	
22.	Click the **Close** button. Close	
23.	For this example, click the **Enroll** button for the 08/27/2015 class. Enroll	
24.	Notice the Available Seats and Available Waitlist. Available Seats indicates the number of open spots for this class. Available Waitlist indicates the number of students who can be placed on a waitlist if there are no available seats. In this example, you will not be waitlisted since there are 10 available seats.	
25.	Click the **Submit Enrollment** button. Submit Enrollment	
26.	Notice the message indicating the enrollment requires approval. **Note:** All enrollments will require a manager's approval.	
27.	Click the **Learning Home** link. Learning Home	
28.	Click the **My Learning** link to see your personal learning activities. My Learning	
29.	My Learning displays all of your learning activities. Notice the status of "Pending Approval" for Being Calm and Clear.	
30.	Click the **Home** link. Home	
31.	Click the **Sign out** link. Sign out	
32.	You have completed the topic "Searching the Learning Catalog & Enrolling in a Class". **End of Procedure - Job Aid.**	

Searching the Learning Catalog & Registering for a Curriculum Program

A curriculum program guides you, as a learner, along a specific learning path over an unrestricted period of time to fulfill one or more objectives. Because a curriculum has no built-in time frame for completion, the learning is self-paced. The record of completion for a curriculum does not expire, therefore, you only need to complete the curriculum once.

The curriculum in this example requires you to complete 4 courses to successfully complete the curriculum.



Procedure - Job Aid

In this topic, you will search the learning catalog for a curriculum program and register for the program.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**kelly.williamson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	

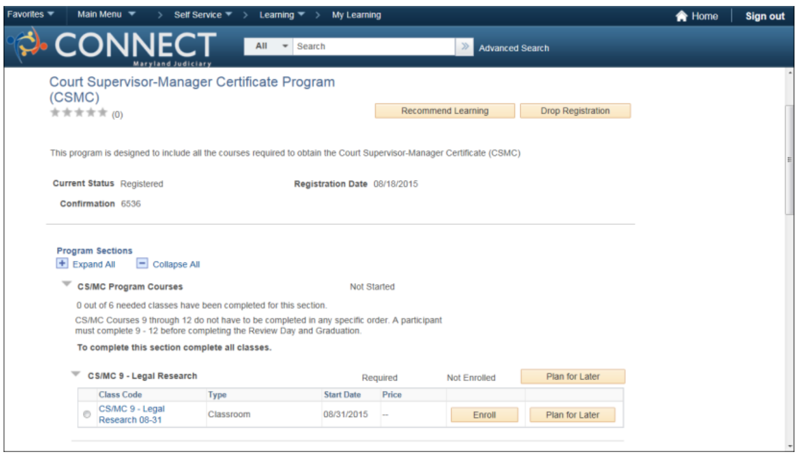
Step	Action	Notes
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning** menu. Learning	
9.	Click the **Find Learning** menu. Find Learning	
10.	You can search for the desired curriculum utilizing any of the following methods: • Filtering the learning catalog using the learning type of "Curriculum" • Performing a keyword search • Using the Advanced Search function In this example, use the advanced search function.	
11.	Click the **Advanced Search** link. Advanced Search	
12.	Click the **Learning Type** drop-down list. All	
13.	Click the **Curriculum** list item. Curriculum	
14.	Click the **Search** button. Search	
15.	Notice the search results displays 1 curriculum.	
16.	Click the **View Details** link. View Details	
17.	Click the **Vertical** scrollbar to move down the page.	
18.	Review the course requirements associated with this curriculum.	
19.	Click the **Register** button. Register	
20.	Click the **Submit Registration** button. Submit Registration	
21.	Notice the status of Pending Approval. **Note:** All program registrations require a manager's approval.	

Step	Action	Notes
22.	Click the **Learning** button. Learning	
23.	Click the **My Learning** menu. My Learning	
24.	Notice Court Professional Certificate is displayed on the My Learning page with a status of Pending Approval.	
25.	Click the **Home** link. Home	
26.	Click the **Sign out** link. Sign out	
27.	You have completed the topic "Searching the Learning Catalog & Registering for a Curriculum Program". **End of Procedure - Job Aid.**	

Enrolling in a Class from the Curriculum Progress Page

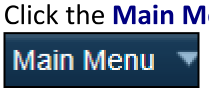
A curriculum program guides you, as a learner, along a specific learning path over an unrestricted period of time to fulfill one or more objectives. Because a curriculum has no built-in time frame for completion, the learning is self-paced. The record of completion for a curriculum does not expire, therefore, you only need to complete the curriculum once.

Once registered for the program, the Curriculum Progress page displays all the courses that define the program in addition to your enrollment and completion status for each of the courses. As you view these courses, you can enroll into the classes simply by clicking the "Enroll" button for the desired class.



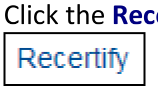
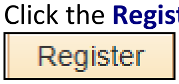
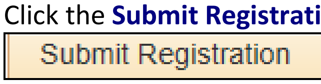
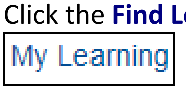
Procedure - Job Aid

In this topic, you will enroll into a class from a curriculum program that you are registered for.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**nancy.kline**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	

Step	Action	Notes
9.	Click the **My Learning** menu.	
10.	In order to enroll into a class from the curriculum program, you must first be registered for the program. This means you will have submitted the program registration request and your manager will have approved it. Notice in this example, the curriculum status is "Registered" meaning it has already been approved by the manager.	
11.	Click the **Court Supervisor-Manager Certificate Program (CSMC)** link to access the Curriculum Progress page. Court Supervisor-Manager Certificate Program (CSMC)	
12.	The Curriculum Progress page displays all the courses that define the program and your enrollment status for each of the courses.	
13.	Click the **Vertical** scrollbar to move down the page.	
14.	In this example, you are not currently enrolled into the CS/MC 9 - Legal Research course which is the first course in the program.	
15.	Click the **Enroll** button for the CS/MC 9 - Legal Research 08-31 class. Enroll	
16.	Click the **Submit Enrollment** button. Submit Enrollment	
17.	Notice the message indicating the enrollment requires approval from your manager.	
18.	Click the **My Learning** menu. My Learning	
19.	The CS/MC 9 - Legal Research course is displayed on your My Learning page with a status of "Pending Approval".	
20.	Click the **Home** link. Home	
21.	Click the **Sign out** link. Sign out	
22.	You have completed the topic "Enrolling in a Class from the Curriculum Progress Page". **End of Procedure - Job Aid.**	

Procedure - Job Aid

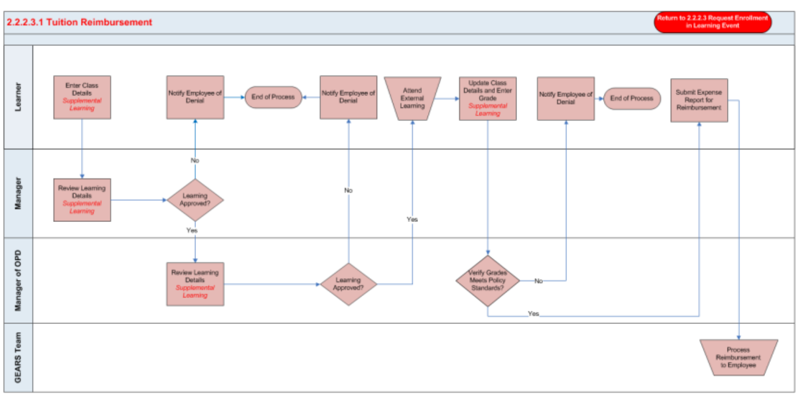
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**stephen.stewart**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	The status of the certification program is listed under **My Certification Status**. Click the Program Name link to access the program page where you can review detailed information about what is required to complete the program.	
11.	The **Status** column displays the current status for the program. In this example, the program is in Warning status.	
12.	The **Status Date** column lists the date on which the current status took effect.	
13.	Click the **Recertify** link. 	
14.	Click the **Register** button. 	
15.	Click the **Submit Registration** button. 	
16.	Click the **Find Learning** link. 	

Step	Action	Notes
17.	Notice you are now registered for Handgun Use and Safety Certification-2015.	
18.	Click the **Home** link.  	
19.	Click the **Sign out** link.  	
20.	You have completed the topic "Monitoring Certification Status & Registering for a Recertification Program". **End of Procedure - Job Aid.**	

Managing Supplemental Learning

Supplemental learning is any learning event that occurs outside of the CONNECT learning catalog. As an employee, you are allotted $2500 annually for supplemental learning. All supplemental learning requests require approval from your manager and the OPD Manager. Once you submit the learning request, the approval workflow will automatically route to your manager first, then the OPD Manager.

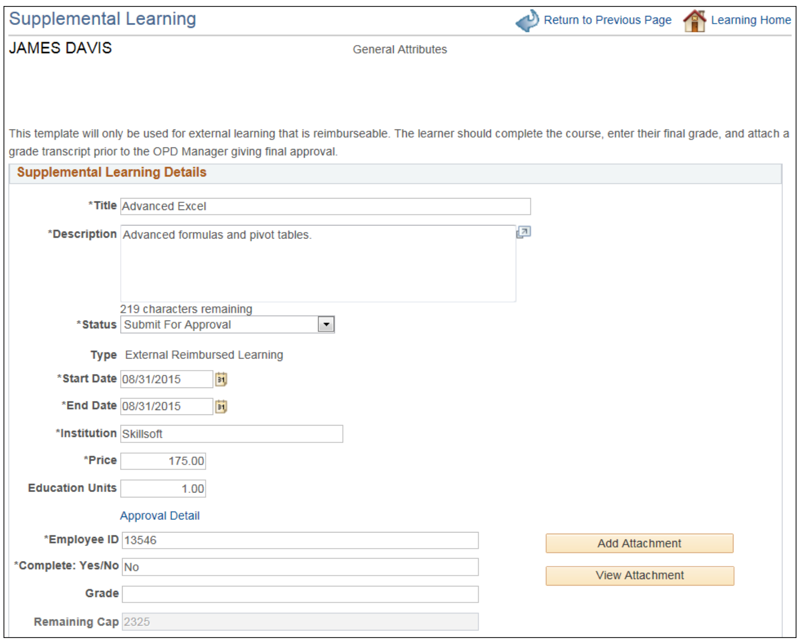
Once the learning has been completed, you must update the initial learning request with a completion status and an official transcript of completion from the issuing institution. This update will be routed to the OPD Manager for final approval. Once approved by the OPD Manager, you can submit an expense form to receive the tuition reimbursement.



Submitting a Supplemental Learning Tuition Reimbursement Request

Supplemental learning consists of learning opportunities outside of the CONNECT catalog. This type of learning includes but is not limited to seminars, conferences, academic courses, etc. Employees can request reimbursement for supplemental learning up to a maximum of $2500 per calendar year.

Each supplemental learning event will be entered into CONNECT along with the price and the system will calculate your total balance remaining throughout the year.


Supplemental Learning
Return to Previous Page
Learning Home
JAMES DAVIS
General Attributes

This template will only be used for external learning that is reimburseable. The learner should complete the course, enter their final grade, and attach a grade transcript prior to the OPD Manager giving final approval.

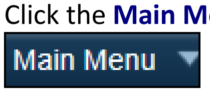
Supplemental Learning Details

*Title	Advanced Excel
*Description	Advanced formulas and pivot tables.
	219 characters remaining
*Status	Submit For Approval
Type	External Reimbursed Learning
*Start Date	08/31/2015
*End Date	08/31/2015
*Institution	Skillsoft
*Price	175.00
Education Units	1.00
	Approval Detail
*Employee ID	13546
*Complete: Yes/No	No
Grade	
Remaining Cap	2325

Add Attachment
View Attachment

Procedure - Job Aid

In this topic, you will submit a tuition reimbursed supplemental learning request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	

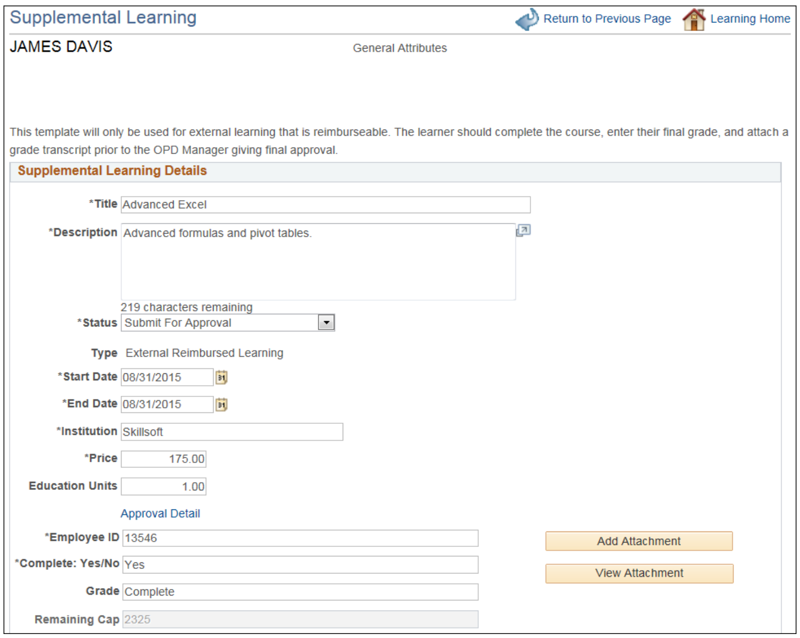
Step	Action	Notes
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **Supplemental Learning** menu.	
10.	Click the **Type** drop-down list. Select...	
11.	Click the **External Reimbursed Learning** list item. External Reimbursed Learning	
12.	Click the **Add Supplemental Learning** button. Add Supplemental Learning	
13.	Click in the **Title** field.	
14.	Enter "**Advanced Excel**" into the **Title** field.	
15.	Click in the **Description** field.	
16.	In this training example, the description (Advanced formulas and pivot tables.) was entered for you.	
17.	Click the **Status** drop-down list. Select...	
18.	Click the **Submit For Approval** list item. Submit For Approval	
19.	Click in the **Start Date** field. 08/13/2015	
20.	Press **[Backspace]**.	
21.	Enter "**08/31/15**" into the **Start Date** field.	
22.	Click in the **End Date** field. 08/13/2015	
23.	Press **[Backspace]**.	
24.	Enter "**08/31/15**" into the **End Date** field.	
25.	Click in the **Institution** field.	
26.	Enter "**Skillsoft**" into the **Institution** field.	
27.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
28.	**Note:** Every employee is allotted $2500 annually for tuition reimbursement. The Remaining Cap displays your total reimbursement balance remaining for the calendar year. The Remaining Cap balance will be updated each time you submit a supplemental learning request.	
29.	Click in the **Price** field. 0.00	
30.	Enter the total cost of the course into the Price field. Enter "**175**" into the **Price** field.	
31.	Notice the Remaining Cap balance reflects a deduction of $175. The total went from 2500 to 2325 once the price was entered.	
32.	Enter "**1**" into the **Education Units** field.	
33.	Enter "**13546**" into the **Employee ID** field.	
34.	Enter "**No**" into the **Complete: Yes/No** field.	
35.	Click the **Save** button. Save	
36.	Notice the message indicating the supplemental learning, Advanced Excel, has a status of Pending Approval. All initial approval requests will be routed to your manager. Once approved by your manager, the request will then automatically be routed to the OPD Manager for final approval. As the requestor, you will be notified by email if your supplemental learning request was approved or denied. Receiving an "Approved" notification from the OPD Manager is your indication to complete the learning event.	
37.	Click the **Home** link. Home	
38.	Click the **Sign out** link. Sign out	
39.	You have completed the topic "Submitting a Supplemental Learning Tuition Reimbursement Request". **End of Procedure - Job Aid.**	

Updating a Completed Supplemental Learning Reimbursement Request

Supplemental learning consists of learning opportunities outside of the CONNECT catalog. This type of learning includes but is not limited to seminars, conferences, academic courses, etc.

Once you have completed the supplemental learning, you can update your record in CONNECT to reflect the completion status, grade, and to upload a certificate of completion. Upon submitting the completed supplemental learning request, the OPD Manager will review the attachment and confirm the completion and grade for this request.



Procedure - Job Aid

In this topic, you will update a supplemental learning request with completion data after you attended the learning event.

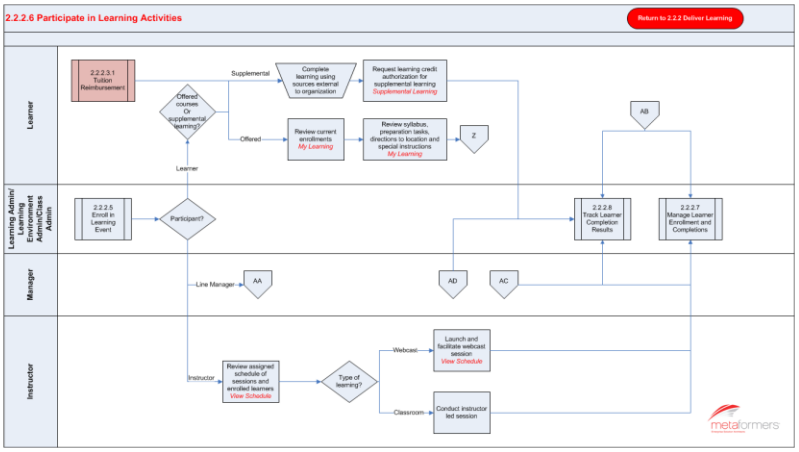
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

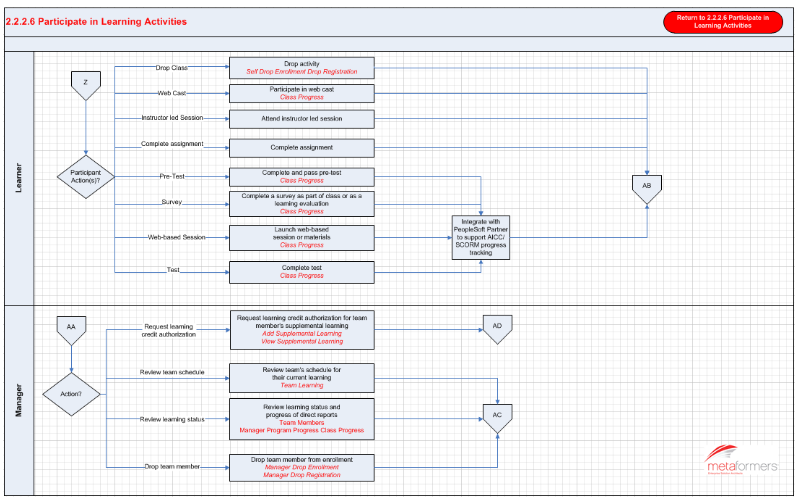
Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	Use the My Learning page to locate the supplemental learning record that will be updated.	
11.	Click the **Modify** button for the External Reimbursed Learning event "Advanced Excel". Modify	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	Click in the **Complete: Yes/No** field.	
14.	Press **[Backspace]**.	
15.	Enter "**Yes**" into the **Complete: Yes/No** field.	
16.	Enter "**Complete**" into the **Grade** field.	
17.	**Note:** Depending on the type of external learning you completed, you might receive a letter grade (A, B, C) or simply a completion status. Enter the grade accordingly.	
18.	In order to be reimbursed, the OPD Manager must confirm that you completed the course and received a sufficient grade to meet organizational policy. You must attach a transcript from the issuing institution. **Note:** You will need an electronic copy of the transcript.	
19.	Click the **Add Attachment** button. Add Attachment	
20.	Click the **Browse** button to locate the transcript on your computer. Browse...	
21.	In this example, the electronic transcript was placed in a folder titled Learning Certificates. Click the **Excel_Specialist** object.	

Step	Action	Notes
22.	Click the **Open** button.	
23.	Click the **Upload** button.	
24.	Click the **View Attachment** button to confirm your transcript was uploaded successfully.	
25.	Notice the attachment opened in a new tab at the top of the page. Quickly view the attachment to ensure it is the correct document for this learning record.	
26.	When you are finished, click the **Close Tab (X)** button to close the attachment. Be sure you are closing the correct tab for the attachment.	
27.	Click the **Save** button.	
28.	Notice the message indicating the status is Pending Approval. The OPD Manager will verify your course completion based on the attached documentation. **Once approved by the OPD, you will receive a notification indicating the request was approved. At that point, you can submit an expense form to receive your reimbursement.**	
29.	Click the **Home** link.	
30.	Click the **Sign out** link.	
31.	You have completed the topic "Updating a Completed Supplemental Learning Reimbursement Request". **End of Procedure - Job Aid.**	

Participating in Learning Activities

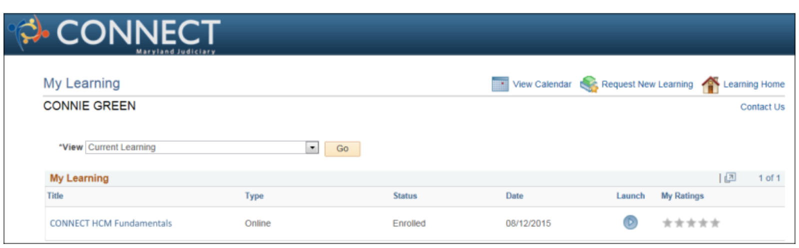
Participate in your instructor-led or web-based learning events.





Accessing a Web-Based Course

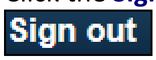
Web-based courses are courses that can be completed online and can be launched directly from CONNECT.



Procedure - Job Aid

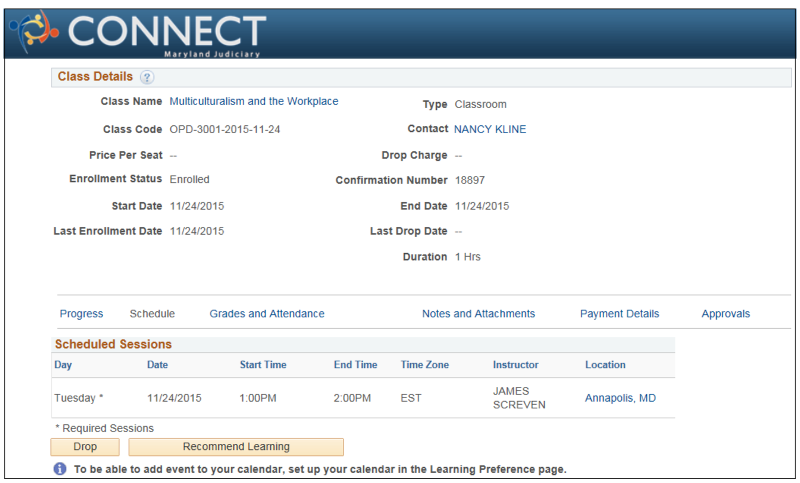
In this topic, you will navigate to your "My Learning" page and launch a web-based course.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	Web-based courses are self-paced and can be launched directly from CONNECT. When you click the launch button, the course will likely open in a new window.	
11.	Click the **Launch** button for the CONNECT HCM Fundamentals course. 	
12.	Complete the online course as instructed. When you are finished, click the **Close Tab** button to close the online course. 	
13.	Notice the course CONNECT HCM Fundamentals is no longer displayed as part of your current learning. To view the status of the course, change the View to display Completed Learning.	
14.	Click the **View** drop-down list.	
15.	Click the **All Completed Learning** list item.	

Step	Action	Notes
16.	Click the **Go** button. 	
17.	Notice the course CONNECT HCM Fundamentals is displayed under All Completed Learning with a status of Completed.	
18.	Click the **Home** link. 	
19.	Click the **Sign out** link. 	
20.	You have completed the topic "Accessing a Web-Based Course". **End of Procedure - Job Aid.**	

Viewing Your Course Details (Progress, Grades, Approvals, Schedule, etc.)

Once enrolled into a course, you can view your progress, class schedule, grade & attendance, notes & attachments, and approvals.



Procedure - Job Aid

In this topic, you will view the details for a course in which you are enrolled.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

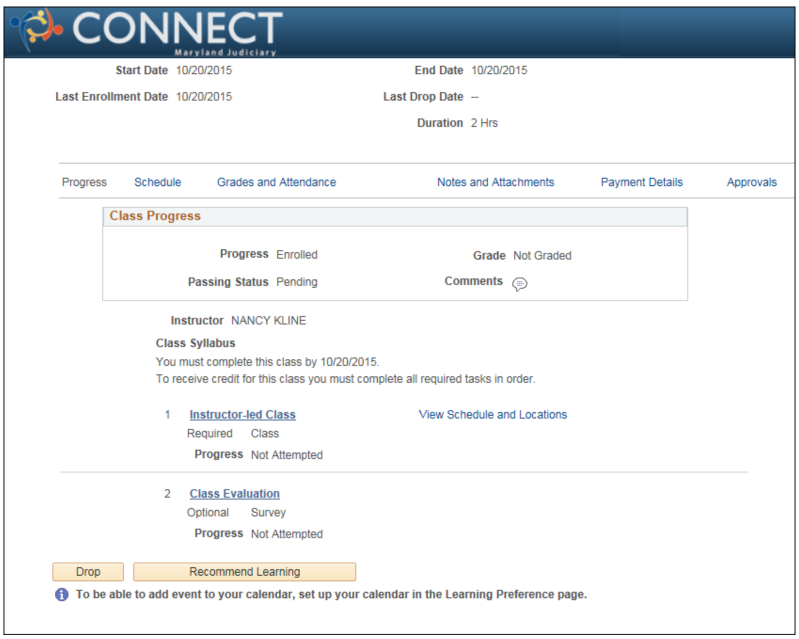
Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	Click the **Multiculturalism and the Workplace** link. Multiculturalism and the Workplace	
11.	Click the **Vertical** scrollbar to move down the page.	
12.	Click the **Schedule** link. Schedule	
13.	View the class and session details.	
14.	Click the **Grades and Attendance** link. Grades and Attendance	
15.	An instructor or administrator will update your progress, attendance, and passing status as you attend the course. You can view these statuses at any time.	
16.	Click the **Notes and Attachments** link. Notes and Attachments	
17.	Any notes or attachments added by the instructor or administrator will be displayed on this page. This class however, does not contain notes or attachments.	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Viewing You Course Details (Progress, Grades, Approvals, Schedule, etc.)". **End of Procedure - Job Aid.**	

Understanding and Completing Course Learning Components

Learning components are the building blocks of a course. CONNECT supports 6 basic types of learning components:

- Web-based
- Session
- Webcast
- Test
- Survey
- Assignment

Each course must have at least 1 learning component but could have more than one. In most cases, you will see courses that either have a class session, web-based component, or a survey used to evaluate the course.



Procedure - Job Aid

In this topic, you will view a course's learning components.

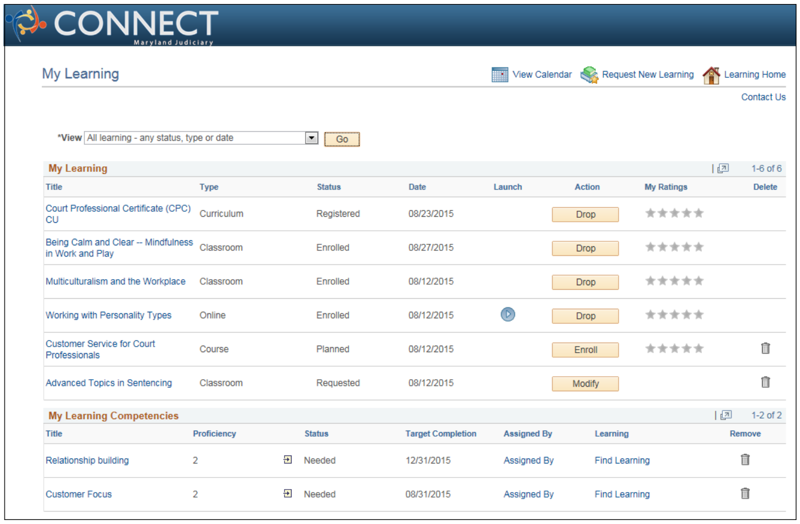
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Learning** menu. Learning	
9.	Click the **My Learning** menu. My Learning	
10.	Click the **Being Calm and Clear -- Mindfulness in Work and Play** link. Being Calm and Clear -- Mindfulness in Work and Play	
11.	Click the **Vertical** scrollbar to move down the page.	
12.	Notice this course has two learning components: • Instructor-led Class • Class Evaluation You must satisfy the requirements for each component in order to receive credit for the course. In this example, the instructor-led class is required but the class evaluation is optional.	
13.	In some cases, you might need to complete the first component before you can start the second component. In this example, you would have to complete the class before you could complete the evaluation.	
14.	Click the **Instructor-led Class** link. Instructor-led Class	
15.	You can view the completion details for each component that defines the course. Completion details for instructor led classes will be entered by the instructor or learning administrator based on your participation in the class.	

Step	Action	Notes
16.	Click the **Return to Previous Page** link. Return to Previous Page	
17.	Click the **Class Evaluation** link. Class Evaluation	
18.	View the completion details for the class evaluation. Online components such as surveys and web-based courses will be updated automatically as you launch and complete the component.	
19.	Click the **Return to Previous Page** link. Return to Previous Page	
20.	Click the **Home** link. Home	
21.	Click the **Sign out** link. Sign out	
22.	You have completed the topic "Understanding and Completing Course Learning Components". **End of Procedure - Job Aid.**	

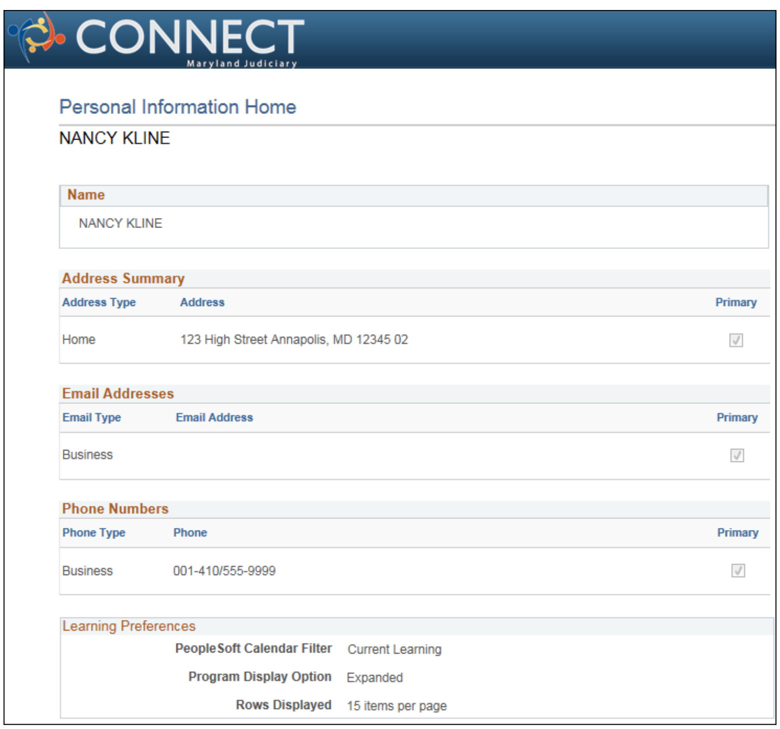
My Learning

Use the My Learning page to view all your learning transcripts, perform actions such as drop and enroll, and print certificates of completion for selected courses.



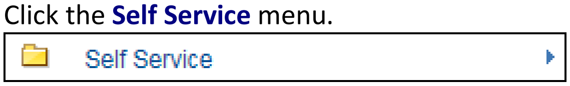
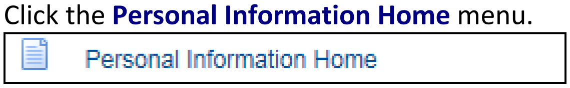
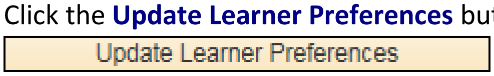
Viewing the Personal Information Home Page

You can view your personal information in the CONNECT Learning system. Any changes to your personal information however, must be made in the CONNECT HR system.



Procedure - Job Aid

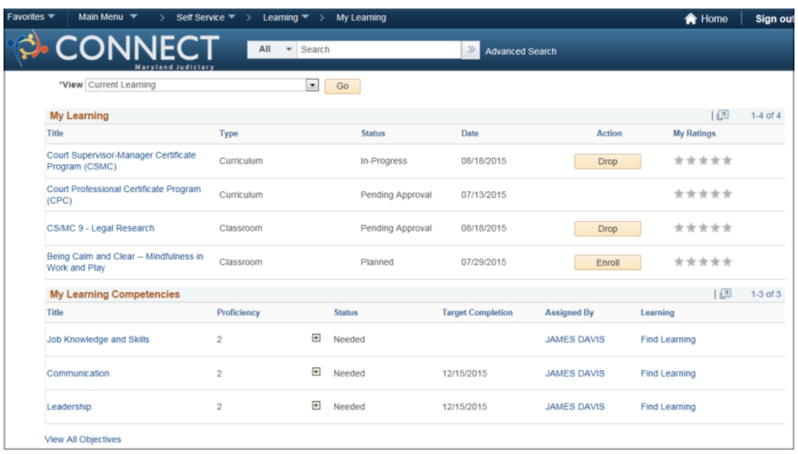
In this topic, you will view your personal information page in the CONNECT learning environment.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**nancy.kline**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Personal Information Home** menu. 	
9.	Note: This a view only page. Your personal information on this page was fed from the CONNECT HR system. Any updates that need to be made to your personal data must be performed in the CONNECT HR system.	
10.	Click the **Vertical** scrollbar to move down the page.	
11.	Some of the data on this page was masked for privacy.	
12.	Click the **Update Learner Preferences** button. 	
13.	When you search the catalog for courses or programs, CONNECT is set to automatically display the "Basic Search" page which limits your search criteria. If desired, you can change this setting to "Advanced Search" which will automatically display the advanced search fields when you access the catalog. For this example, do not change the setting.	

Step	Action	Notes
14.	Click the **Cancel** button. Cancel	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed the topic "Viewing the Personal Information Home Page". **End of Procedure - Job Aid.**	

Viewing Learning Transcripts & Printing a Certificate of Completion

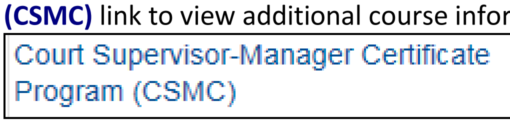
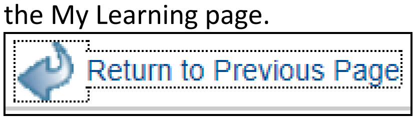
Use the My Learning page to view all your learning transcripts, perform actions such as drop and enroll, and print certificates of completion for selected courses.

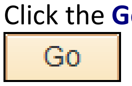
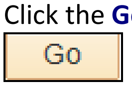


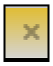
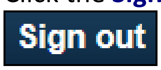
Procedure - Job Aid

In this topic, you will view your learning transcripts and print a certificate of completion for a completed course.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**nancy.kline**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

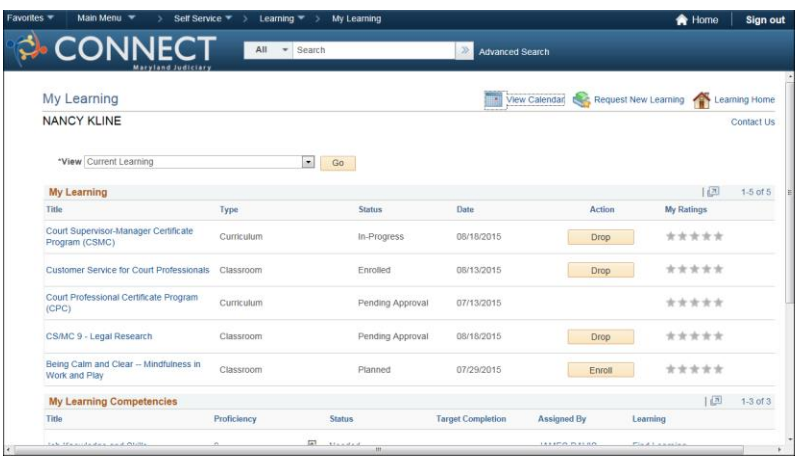
Step	Action	Notes
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	Click the **Vertical** scrollbar to move down the page.	
11.	By default, the My Learning page displays your current learning and competencies. Current learning consists of courses and programs that you are currently involved with whether they are planned, pending approval, enrolled, in-progress, etc.	
12.	In addition to viewing your learning activities on the My Learning page, you can perform certain actions. You can click any word in blue to view additional information. For example, clicking a course title will display more information about the course. You can also use the action buttons to drop or enroll into a course or program.	
13.	Click the **Court Supervisor-Manager Certificate Program (CSMC)** link to view additional course information.  	
14.	When finished, click the **Return to Previous Page** link to return to the My Learning page.  	

Step	Action	Notes
15.	You can use the View drop-down list to change the view from Current Learning to something else. Options include: • Completed learning • Dropped learning • All learning within the last 90 days • All completed learning for the calendar year • All learning, any type and status • Requested learning	
16.	Click the **View** drop-down list.	
17.	Click the **All Dropped Learning** list item.	
18.	Click the **Go** button. 	
19.	All dropped learning is displayed.	
20.	Click the **View** drop-down list.	
21.	Click the **All completed learning this calendar year** list item.	
22.	Click the **Go** button. 	
23.	All learning that was completed during the current calendar year is displayed.	
24.	Click the **View** drop-down list.	
25.	Click the **Requested Learning** list item.	
26.	Click the **Go** button. 	
27.	All submitted learning requests are displayed.	
28.	Click the **View** drop-down list.	
29.	Click the **All Completed Learning** list item.	
30.	Click the **Go** button. 	
31.	If you see a print icon for a specific learning item, you can click the icon to print a certificate of completion for that item. In this example, the print icon is not available for the MS Word Advanced Course and the Excel Advanced Course since these are supplemental learning and were completed outside of CONNECT.	

Step	Action	Notes
32.	Click the **Print** button for Advanced Topics in Sentencing. 	
33.	Use the toolbar at the bottom of the page to print or save the certificate as desired.	
34.	When finished, click the **Close (X)** button to close the certificate. 	
35.	Click the **Home** link. 	
36.	Click the **Sign out** link. 	
37.	You have completed the topic "Viewing Learning Transcripts and Printing a Certificate of Completion". **End of Procedure - Job Aid.**	

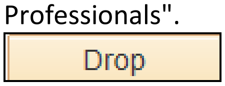
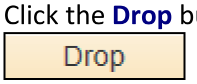
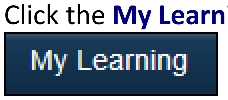
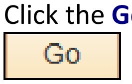
Dropping a Self-Enrolled Course from My Learning

From the My Learning page in CONNECT, you can drop courses and programs that have been self-enrolled by you. You cannot drop courses or programs that have been assigned by your manager or a learning administrator.



Procedure - Job Aid

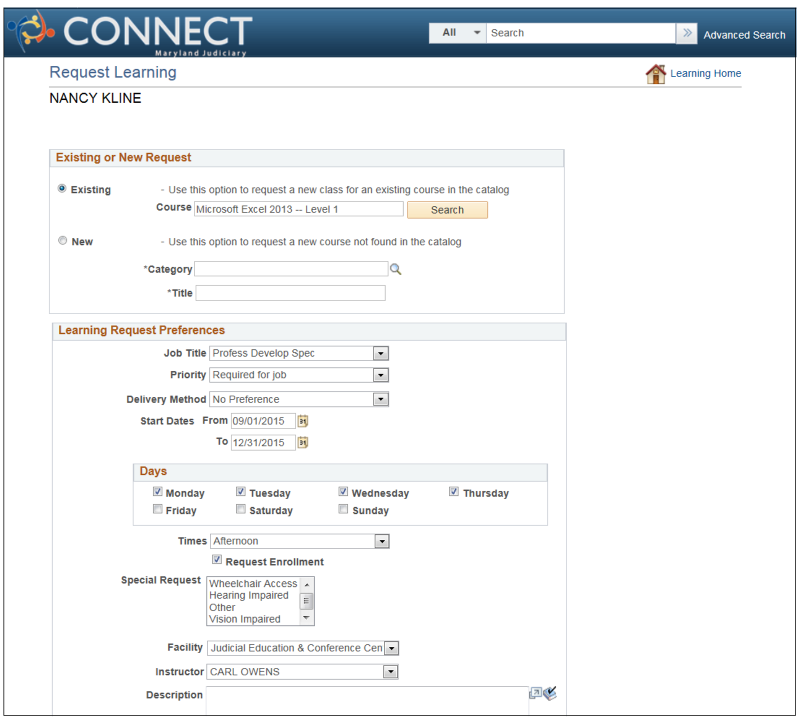
In this topic, you will drop a self-enrolled course.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**nancy.kline**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **My Learning** menu.	
10.	**Note:** You can only drop a course or program that was self-enrolled by you. You cannot drop a course or program that was assigned by your manager or a learning administrator.	
11.	Click the **Drop** button for the course "Customer Service for Court Professionals". 	
12.	Click the **Drop** button to confirm the action. 	
13.	Notice the message indicating the drop was successful.	
14.	Click the **My Learning** link. 	
15.	By changing the current view, you can see all learning items that have been dropped.	
16.	Click the **View** drop-down list.	
17.	Click the **All Dropped Learning** list item.	
18.	Click the **Go** button. 	
19.	Notice the course that was just dropped (Customer Service for Court Professionals) is displayed with a status of "Dropped".	
20.	Click the **Home** link. 	

Step	Action	Notes
21.	Click the **Sign out** link. **Sign out**	
22.	You have completed the topic "Dropping a Self-Enrolled Course from My Learning". **End of Procedure - Job Aid.**	

Requesting a New Class for an Existing Course

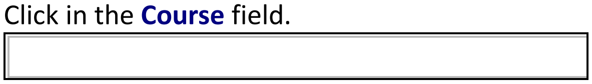
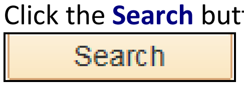
Learning requests enable you to request new courses and classes if they are not in the CONNECT catalog or if classes are full or waitlisted. You can enter desired preferences for the course or class such as dates, times, locations, etc. It is important to note however, submitting the request does not guarantee that the requested learning will be offered.



Procedure - Job Aid

In this topic, you will search the learning catalog for a specific class, realize the class doesn't exist, then request the class to be created.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**nancy.kline**" into the **User ID** field.	
3.	Click in the **Password** field.	

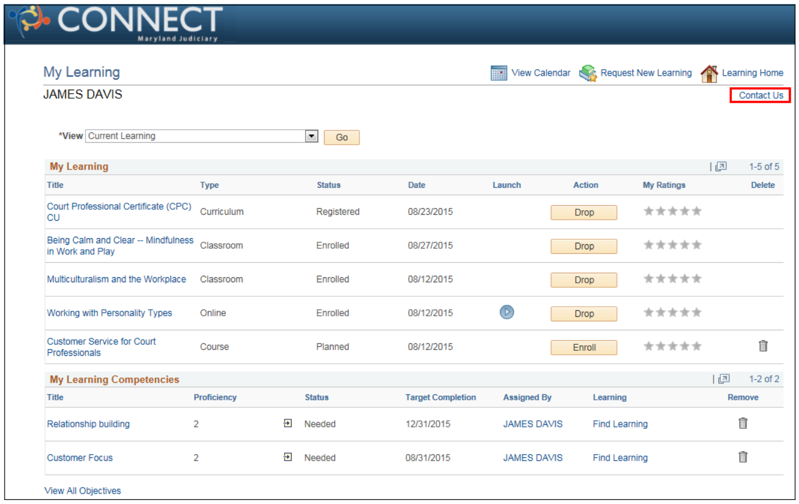
Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu.	
8.	Click the **Learning** menu.	
9.	Click the **Find Learning** menu.	
10.	**Note:** Before submitting a request for a new course or class, it is important to search the catalog first to ensure the desired course/class doesn't currently exist.	
11.	Click in the **Search by keyword** field.	
12.	Enter "**excel**" into the **Search by keyword** field.	
13.	Click the **Search** button. 	
14.	Click the **Vertical** scrollbar to move down the page.	
15.	Notice there are several Excel courses in the catalog but none of the courses have scheduled classes.	
16.	Click the **Vertical** scrollbar to move back up the page.	
17.	Click the **Request New Learning** link. 	
18.	The Learning Request function provides the ability to either request a new class for an existing course or request a new course. In this example, you will request a new class for the Level 1 Microsoft Excel course.	
19.	Click in the **Course** field. 	
20.	Enter "**excel**" into the **Course** field.	
21.	Click the **Search** button. 	

Step	Action	Notes
22.	Click the **Select** button for the course in which you are requesting the class. Select	
23.	Notice the course you selected is populated in the Course field.	
24.	The Learning Request Preferences allow you to specify your desired preferences for the class such as: • Delivery method • Date range • Days of the week • Facility • Instructor Remember, these are your desired preferences but does not guarantee that a learning administrator will create the class based solely on these preferences.	
25.	Click the **Priority** drop-down list. No Preference	
26.	Click the **Required for job** list item. Required for job	
27.	Click the **Delivery Method** drop-down list. No Preference	
28.	Click the **Classroom** list item. Classroom	
29.	Click in the **Start Dates From** field.	
30.	Enter "**09/01/2015**" into the **Start Dates From** field.	
31.	Click in the **Start Dates To** field.	
32.	Enter "**12/31/2015**" into the **Start Dates To** field.	
33.	Click the **Vertical** scrollbar to move down the page.	
34.	Click the **Monday** option. Monday	
35.	Click the **Tuesday** option. Tuesday	

Step	Action	Notes
36.	Click the **Wednesday** option. Wednesday	
37.	Click the **Thursday** caret. Thursday	
38.	Click the **Times** drop-down list. No Preference	
39.	Click the **Afternoon** list item. Afternoon	
40.	Click the **Request Enrollment** option. Request Enrollment	
41.	**Note:** By selecting Request Enrollment, you are requesting the person creating the class to enroll you afterwards.	
42.	Click the **Facility** drop-down list.	
43.	Click the **Judicial Education & Conference Center** list item. Judicial Education & Conference Center	
44.	Click the **Submit Request** button. Submit Request	
45.	Notice the message indicating the request was submitted successfully.	
46.	Click the **Home** link. Home	
47.	Click the **Sign out** link. Sign out	
48.	You have completed the topic "Requesting a New Class for an Existing Course". **End of Procedure - Job Aid.**	

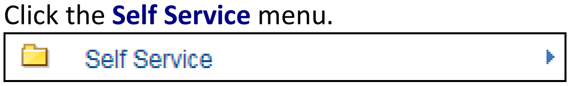
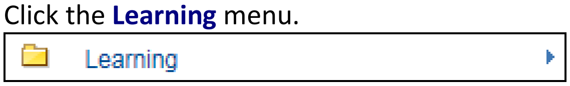
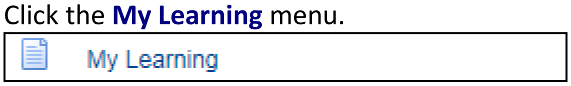
Sending an Ad-Hoc Email to a Class Administrator

From within CONNECT, you can send an ad-hoc email to a learning administrator or the AOC Education Division.



Procedure - Job Aid

In this topic, you will learn how to send an ad-hoc email from CONNECT to a learning administrator or the AOC Education Division.

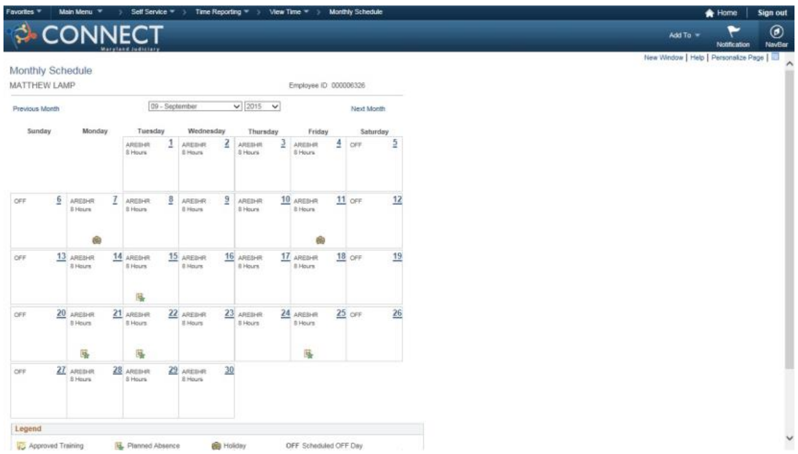
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**james.davis**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Learning** menu. 	
9.	Click the **My Learning** menu. 	

Step	Action	Notes
10.	Anywhere you see "Contact Us" in the CONNECT Learning System, you can click the link to send an email to the MD Courts Education Division.	
11.	Click the **Contact Us** link. Contact Us	
12.	Notice Outlook opens with the Education Division email address automatically populated.	
13.	Compose your email to the Education Division by entering a Subject and the contents of the email as desired.	
14.	In this example, you will not actually send the email. Click the **Close** button. ✕	
15.	Click the **No** button. No	
16.	Click the **Being Calm and Clear -- Mindfulness in Work and Play** link. Being Calm and Clear -- Mindfulness in Work and Play	
17.	If you prefer to contact a specific Learning Administrator as opposed to contacting the Education Division, you can click the Contact name on the Class Progress page.	
18.	Click the **Jimmy Partin** link. Jimmy Partin	
19.	Click the **Close** button. ✕	
20.	Click the **No** button. No	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Sending an Ad-Hoc Email to a Class Administrator". **End of Procedure - Job Aid.**	

Time Reporting - Timesheets

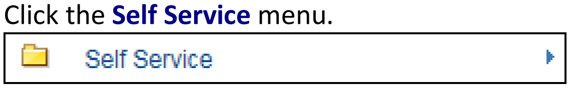
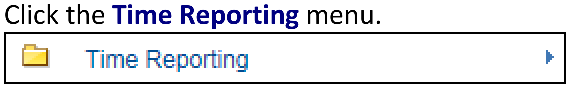
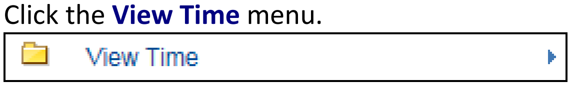
View Monthly-Daily Schedule - Elapsed Time

An employee can view their monthly and daily schedule.



Procedure - Job Aid

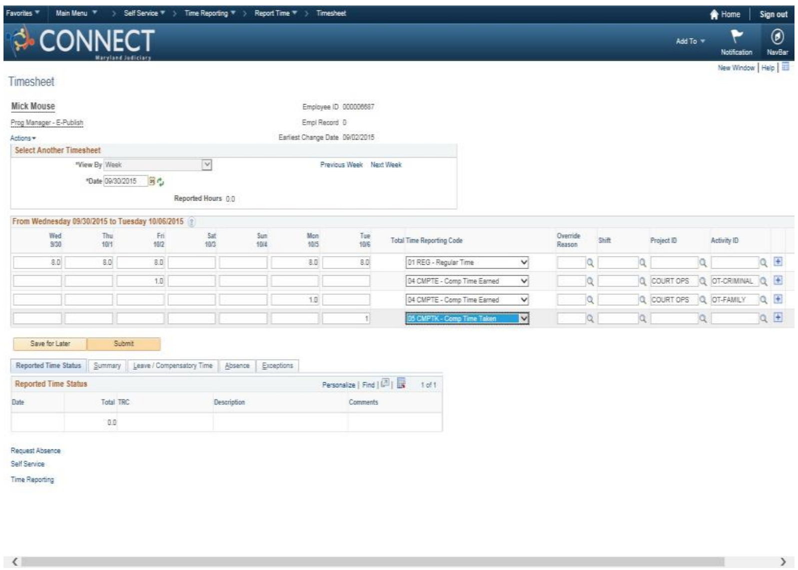
In this topic, you will view the monthly and daily schedule as an employee who uses an elapsed timesheet.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**matthew.lamp**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	
8.	Click the **Time Reporting** menu. 	
9.	Click the **View Time** menu. 	

Step	Action	Notes
10.	Click the **Monthly Schedule** menu. Monthly Schedule	
11.	The current month will be visible on the Monthly Schedule page. You can change the month by clicking on the drop down menu.	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	The Legend identifies the icons on the days in the calendar.	
14.	Click the **Vertical** scrollbar to move back up the page.	
15.	Click the **7** link. 7	
16.	For this example, the employee is scheduled to work 8.00 however, 9/7/2015 is a Holiday.	
17.	Click the **Return to Monthly Schedule** link. Return to Monthly Schedule	
18.	Click the **15** link. 15	
19.	Click the **Return to Monthly Schedule** link. Return to Monthly Schedule	
20.	Click the **Home** link. Home	
21.	Click the **Sign out** link. Sign out	
22.	You have completed the View Monthly-Daily Schedule - Elapsed Time topic. **End of Procedure - Job Aid.**	

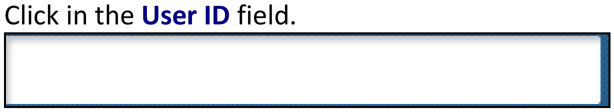
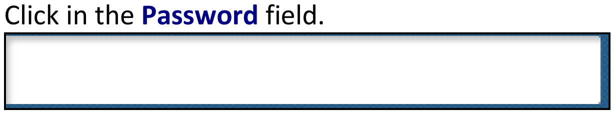
Report Time - Elapsed Timesheet with Project, Activity, and Comp Time

An elapsed timesheet allows an employee to enter time worked in hours per day using a variety of time reporting codes that determine the category for the time worked.



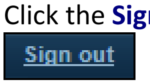
Procedure - Job Aid

In this topic, you will report time on an elapsed timesheet that includes regular work hours and overtime/comp time project hours.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**pamela.vaughn**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	

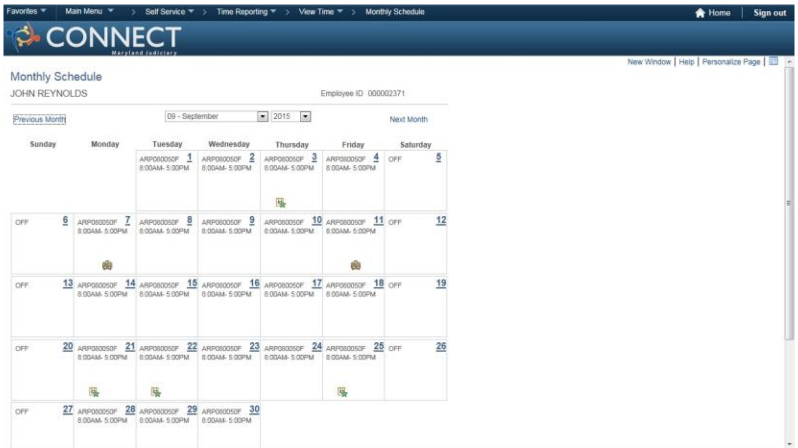
Step	Action	Notes
7.	Click the **Timesheet** link.	
8.	You can use the Previous Week and Next Week hyperlinks to navigate forward and backwards. Employees may report time for up to 3 previous pay periods.	
9.	Click in the **Wed** field.	
10.	Enter "**8**" into the **Wed** field.	
11.	Click in the **Thu** field.	
12.	Enter "**8**" into the **Thu** field.	
13.	Click in the **Fri** field.	
14.	Enter "**8**" into the **Fri** field.	
15.	Click in the **Mon** field.	
16.	Enter "**8**" into the **Mon** field.	
17.	Click in the **Tue** field.	
18.	Enter "**8**" into the **Tue** field.	
19.	Click the **Time Reporting Code** drop-down list.	
20.	Click the **01 REG - Regular Time** list item.	
21.	Click in the **Fri** field.	
22.	Enter "**1**" into the **Fri** field.	
23.	Click the **Time Reporting Code** drop-down list.	
24.	Click the **04 CMPTE - Comp Time Earned** list item.	

Step	Action	Notes
25.	If the overtime is related to a project, the employee would select a Project and Activity ID. Click the **Look up Project ID** button.	
26.	Click the **COURT OPS** link. COURT OPS	
27.	Click the **Look up Activity ID** button.	
28.	Click the **OT-CRIMINAL** link. OT-CRIMINAL	
29.	Click in the **Mon** field.	
30.	Enter "**1**" into the **Mon** field.	
31.	Click the **Time Reporting Code** drop-down list.	
32.	Click the **04 CMPTE - Comp Time Earned** list item. 04 CMPTE - Comp Time Earned	
33.	Click in the **Project ID** field.	
34.	Enter "**court**" into the **Project ID** field.	
35.	Click the **Court Operations** object. COURT OPS Court Operations	
36.	Click the **Look up Activity ID** button.	
37.	Click the **OT-FAMILY** link. OT-FAMILY	
38.	Click the **Add a new row at row 3** button.	
39.	Click in the **Tue** field.	
40.	Enter "**1**" into the **Tue** field.	
41.	Click the **Time Reporting Code** drop-down list.	
42.	Click the **05 CMPTK - Comp Time Taken** list item. 05 CMPTK - Comp Time Taken	

Step	Action	Notes
43.	Make sure to review your inputs before submitting. Click the **Submit** button. 	
44.	After time has been submitted, you can review the status on the Reported Time Status tab.	
45.	Click the **Summary** tab. 	
46.	The Summary tab summarizes worked overtime and comp time hours by day.	
47.	Click the **Leave / Compensatory Time** tab. 	
48.	Leave and Comp Time balances can be viewed on the Leave/Compensatory Time tab.	
49.	Click the **Absence** tab. 	
50.	The Absence tab can be used to launch an absence request. This topic will be explored in more detail in the Absence Management UPKs. All accrued absence balances can be viewed at the bottom of the timesheet page.	
51.	Click the **Home** link. 	
52.	Click the **Sign out** link. 	
53.	You have completed the Report Time - Elapsed Timesheet with Project, Activity, and Comp Time topic. **End of Procedure - Job Aid.**	

View Monthly-Daily Schedule - Punch Time

An employee can view their monthly and daily schedule.



Procedure - Job Aid

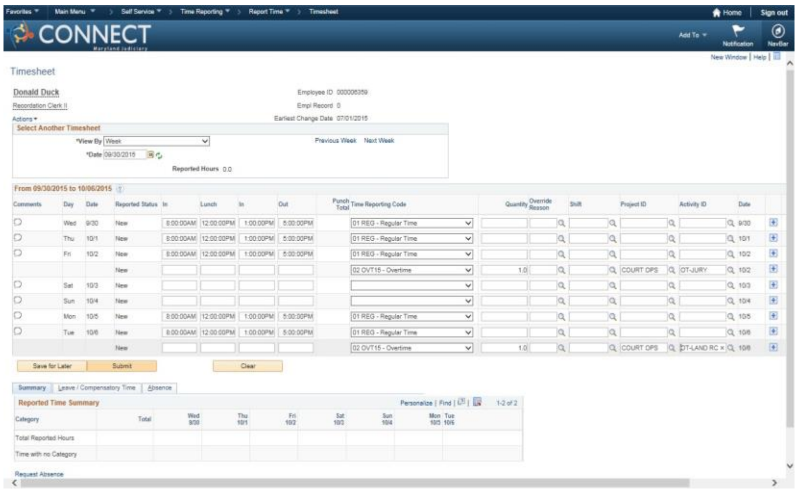
In this topic, you will view the monthly and daily schedule as an employee who uses an punch timesheet.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**john.reynolds**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Time Reporting** menu. Time Reporting	
9.	Click the **View Time** menu. View Time	

Step	Action	Notes
10.	Click the **Monthly Schedule** menu. Monthly Schedule	
11.	The current month will be visible on the Monthly Schedule page. You can change the month by clicking on the drop down menu.	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	The Legend identifies the icons on the days in the calendar.	
14.	Click the **Vertical** scrollbar to move back up the page.	
15.	Click the **7** link. 7	
16.	For this example, the employee is scheduled to work 8.00 however, 9/7/2015 is a Holiday.	
17.	Click the **Return to Monthly Schedule** link. Return to Monthly Schedule	
18.	Click the **15** link. 15	
19.	Click the **More** link to view Shift Details. More	
20.	Click the **Return to Daily Detail** link. Return to Daily Detail	
21.	Click the **Return to Monthly Schedule** link. Return to Monthly Schedule	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the View Monthly-Daily Schedule - Punch Time topic. **End of Procedure - Job Aid.**	

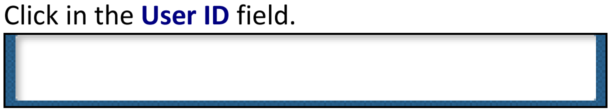
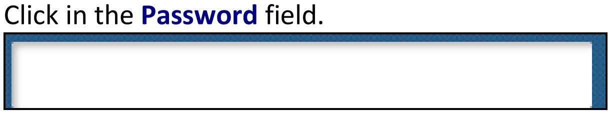
Report Time - Punch Timesheet with Project, Activity, and Overtime

A punch timesheet allows an employee to enter time worked as in/meal/in/out (punch) times worked per day using a variety of time reporting codes that determine the category for the time worked.



Procedure - Job Aid

In this topic, you will report time on a punch timesheet that includes work on a project and overtime.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**kerry.dennis**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Timesheet** link.	
8.	You can use the Previous Week and Next Week hyperlinks to navigate forward and backwards. Employees may report time for up to 3 previous pay periods.	
9.	Click in the **In** field.	
10.	Enter "**8a**" into the **In** field.	
11.	Click in the **Lunch** field.	
12.	Enter "**12p**" into the **Lunch** field.	
13.	Click in the **In** field.	
14.	Enter "**1p**" into the **In** field.	
15.	Click in the **Out** field.	
16.	Enter "**5p**" into the **Out** field.	
17.	Click the **Time Reporting Code** drop-down list.	
18.	Click the **01 REG - Regular Time** list item.	
19.	Click in the **In** field.	
20.	Enter "**8a**" into the **In** field.	
21.	Click in the **Lunch** field.	
22.	Enter "**12p**" into the **Lunch** field.	
23.	Click in the **In** field.	
24.	Enter "**1p**" into the **In** field.	

Step	Action	Notes
25.	Click in the **Out** field.	
26.	Enter "**5p**" into the **Out** field.	
27.	Click the **Time Reporting Code** drop-down list.	
28.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
29.	Click in the **In** field.	
30.	Enter "**8a**" into the **In** field.	
31.	Click in the **Lunch** field.	
32.	Enter "**12p**" into the **Lunch** field.	
33.	Click in the **In** field.	
34.	Enter "**1p**" into the **In** field.	
35.	Click in the **Out** field.	
36.	Enter "**5p**" into the **Out** field.	
37.	Click the **Time Reporting Code** drop-down list.	
38.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
39.	To add additional time for a specific day, click the plus sign in the right hand column to insert a new row for that day. This might include Comp Time or Overtime. Click the **Add a new row at row 3** button.	
40.	Click the **Time Reporting Code** drop-down list.	
41.	Click the **02 OVT15 - Overtime** list item. 02 OVT15 - Overtime	
42.	Click in the **Quantity** field.	
43.	Enter "**1**" into the **Quantity** field.	

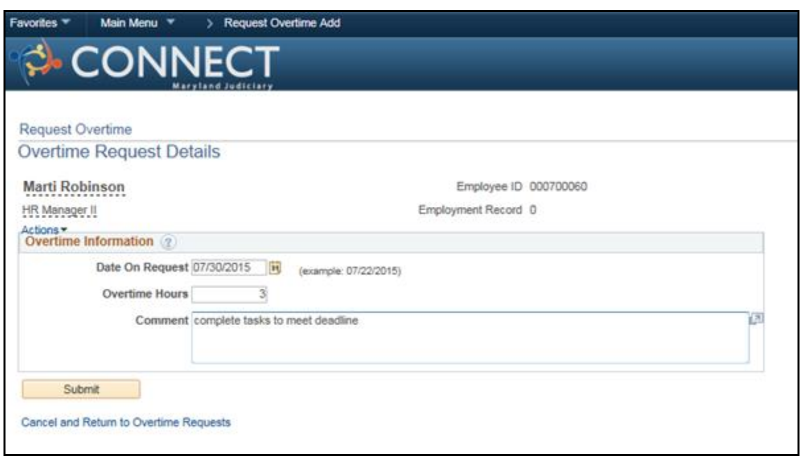
Step	Action	Notes
44.	If the overtime is related to a project, the employee would select a Project and Activity ID. Click the **Look up Project ID** button.	
45.	Click the **COURT OPS** link. COURT OPS	
46.	Click the **Look up Activity ID** button.	
47.	Click the **OT-JURY** link. OT-JURY	
48.	Click in the **In** field.	
49.	Enter "**8a**" into the **In** field.	
50.	Click in the **Lunch** field.	
51.	Enter "**12p**" into the **Lunch** field.	
52.	Click in the **In** field.	
53.	Enter "**1p**" into the **In** field.	
54.	Click in the **Out** field.	
55.	Enter "**5p**" into the **Out** field.	
56.	Click the **Time Reporting Code** drop-down list.	
57.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
58.	Click in the **In** field.	
59.	Enter "**8a**" into the **In** field.	
60.	Click in the **Lunch** field.	
61.	Enter "**12p**" into the **Lunch** field.	
62.	Click in the **In** field.	
63.	Enter "**1p**" into the **In** field.	

Step	Action	Notes
64.	Click in the **Out** field.	
65.	Enter "**5p**" into the **Out** field.	
66.	Click the **Time Reporting Code** drop-down list.	
67.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
68.	Click the **Add a new row at row 8** button.	
69.	Click the **Time Reporting Code** drop-down list.	
70.	Click the **02 OVT15 - Overtime** list item. 02 OVT15 - Overtime	
71.	Click in the **Quantity** field.	
72.	Enter "**1**" into the **Quantity** field.	
73.	Click in the **Project ID** field.	
74.	Enter "**court**" into the **Project ID** field.	
75.	Click the **COURT OPS** object. COURT OPS Court Operations	
76.	Click the **Look up Activity ID** button.	
77.	Click the **OT-LAND RCDS** link. OT-LAND RCDS	
78.	Click the **Submit** button. Submit	
79.	Click the **OK** button. OK	
80.	The Summary tab summarizes worked overtime and comp time hours by day.	
81.	Click the **Leave / Compensatory Time** tab. Leave / Compensatory Time	
82.	Leave and Comp Time balances can be viewed on the Leave/Compensatory Time tab.	

Step	Action	Notes
83.	Click the **Absence** tab.  	
84.	The Absence tab can be used to launch an absence request. This topic will be explored in more detail in the Absence Management UPKs. All accrued absence balances can be viewed at the bottom of the timesheet page.	
85.	Click the **Home** link.  	
86.	Click the **Sign out** link.  	
87.	You have completed the Report Time - Punch Timesheet with Project, Activity, and Overtime topic. **End of Procedure - Job Aid.**	

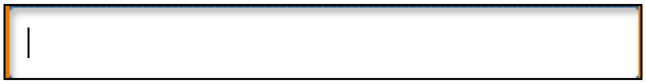
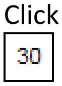
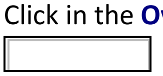
Request Overtime

Employees will be able to submit a request for overtime through self service and the request will route to their manager for review and approval.



Procedure - Job Aid

In this topic, you will request overtime.

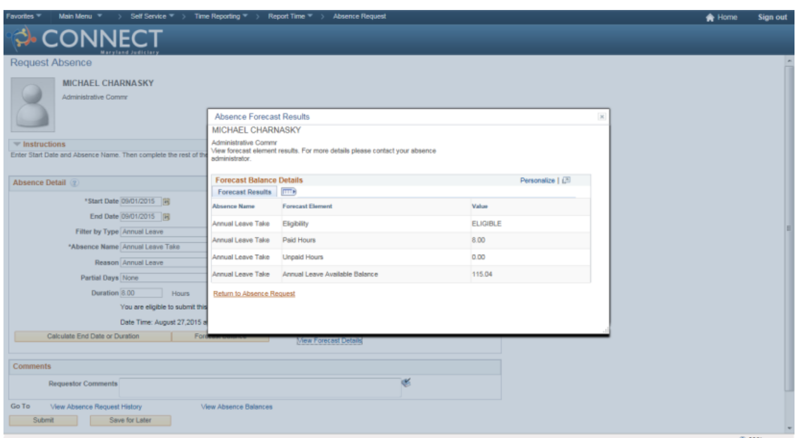
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**marti.robinson**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Overtime Requests** link. 	
8.	Click the **Add Request** button. 	
9.	Click the **Choose a date** button. The date must be the current date or a future date. An overtime request cannot be submitted for a prior date. 	
10.	For this example use the month of July and select Thursday 30. Click the **30** link. 	
11.	Click in the **Overtime Hours** field. 	
12.	Enter "**3**" into the **Overtime Hours** field.	
13.	Click in the **Comment** field. Always enter comments.	
14.	Enter "**complete tasks to meet deadline**" into the **Comment** field.	

Step	Action	Notes
15.	Click the **Submit** button. Submit	
16.	Click the **OK** button. OK	
17.	Notice the Request Status displays "Needs Approval". The approval will be routed to your Manager.	
18.	You have completed requesting approval for overtime. Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the Request Overtime topic. **End of Procedure - Job Aid.**	

Absence Requests

Request Time Off with Balance Forecasting - Annual Leave

Request Time Off with Balance Forecasting - Annual Leave



Procedure - Job Aid

In this topic, you will request time off using annual leave as an employee. You will ensure you are eligible to request annual leave by forecasting.

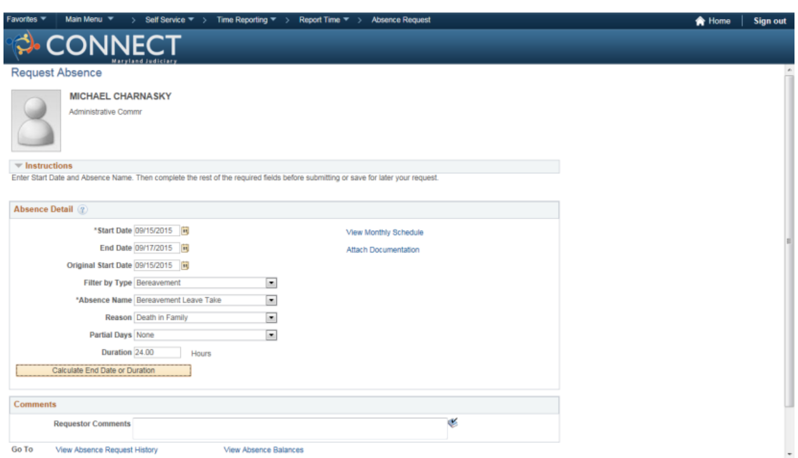
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. Absence Request	
8.	Before submitting an absence request, you can view your current available absence balances. Click the **View Absence Balances** link. View Absence Balances	
9.	The View Absence Balances page will list the available absence balances as of the last pay period.	
10.	Click the **Return to Absence Request** link. Return to Absence Request	
11.	Double-click in the **Start Date** field. 08/27/2015	
12.	To clear the field, Press **[Backspace]**.	
13.	Enter "**09/01/2015**" into the **Start Date** field.	
14.	Click the **Filter by Type** drop-down list. All	
15.	Click the **Annual Leave** list item. Annual Leave	

Step	Action	Notes
16.	Click the **Absence Name** drop-down list. Select Absence Name	
17.	Click the **Annual Leave Take** list item. Annual Leave Take	
18.	Depending on the Absence Name selected, the Current Balance for the Absence Name will be displayed. For example, Accident Leave Take will not display a current available balance.	
19.	Click the **Reason** drop-down list. Select Absence Reason	
20.	Click the **Annual Leave** list item. Annual Leave	
21.	If applicable, you can attach documentation to support your request. For this example, do not attach a document.	
22.	Click in the **Duration** field.	
23.	Enter "**8**" into the **Duration** field.	
24.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
25.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 8 hours on 9/1/2015.	
26.	Click the **Forecast Balance** button. Forecast Balance	
27.	This message is confirming the employee has enough leave to submit the absence request.	
28.	Click the **View Forecast Details** link. View Forecast Details	
29.	The Absence Forecast Results page indicates that the employee is ELIGIBLE to take 8 paid hours of Annual Leave Take from their Annual Leave Take Available Balance.	
30.	Click the **Return to Absence Request** link. Return to Absence Request	

Step	Action	Notes
31.	Click the **Submit** button. Submit	
32.	To submit the absence request, Click the **Yes** button. Yes	
33.	Click the **OK** button. OK	
34.	After submission, the absence request is routed to the employee's Manager for approval.	
35.	Click the **Home** link. Home	
36.	Click the **Sign out** link. Sign out	
37.	You have completed the Request Time Off with Balance Forecasting - Annual Leave topic. **End of Procedure - Job Aid.**	

Request Time Off without Balance Forecasting - Bereavement

Request Time Off without Balance Forecasting - Bereavement



Procedure - Job Aid

In this topic, you will request time off for bereavement as an employee.

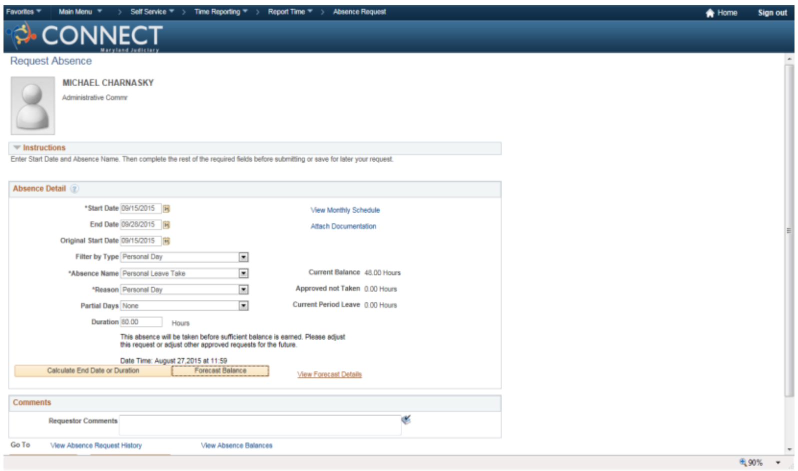
Step	Action	Notes
1.	Click in the **User ID field** field.	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. Main Menu	
8.	Click the **Self Service** menu. Self Service	
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **Report Time** menu. Report Time	
11.	Click the **Absence Request** menu. Absence Request	
12.	Double-click in the **Start Date** field. 09/10/2015	
13.	To clear the field, Press **[Backspace]**.	
14.	Enter "**09/15/2015**" into the **Start Date** field.	
15.	Click the **Filter by Type** drop-down list. All	
16.	Click the **Filter by Type** drop-down list. All	
17.	Click the **Bereavement** list item. Bereavement	
18.	Click the **Absence Name** drop-down list. Select Absence Name	

Step	Action	Notes
19.	Click the **Bereavement Leave Take** list item. Bereavement Leave Take	
20.	Click the **Reason** drop-down list. Select Absence Reason	
21.	Click the **Death in Family** list item. Death in Family	
22.	Click in the **Duration** field.	
23.	If applicable, you can attach documentation to support your request. For this example, do not attach a document.	
24.	Enter "**24**" into the **Duration** field.	
25.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
26.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 24 hours or 3 days.	
27.	Click the **Vertical** scrollbar to move down the page.	
28.	Click the **Submit** button. Submit	
29.	To acknowledge the message for documentation, Click the **OK** button. OK	
30.	To submit the absence request, Click the **Yes** button. Yes	
31.	Click the **OK** button. OK	
32.	After submission, the absence request is routed to the employee's Manager for approval.	
33.	Click the **Home** link. Home	
34.	Click the **Sign out** link. Sign out	

Step	Action	Notes
35.	You have completed the Request Time Off without Balance Forecasting - Bereavement topic. **End of Procedure - Job Aid.**	

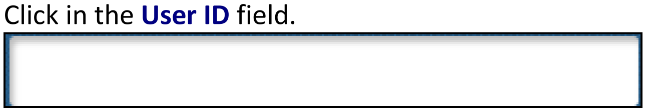
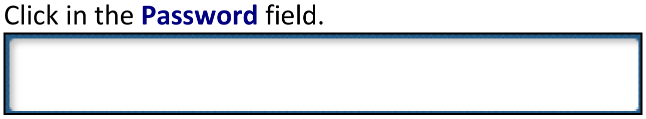
Request Time Off - Insufficient Balance

Request Time Off - Insufficient Balance



Procedure - Job Aid

In this topic, you will attempt to request time off without having a sufficient leave balance.

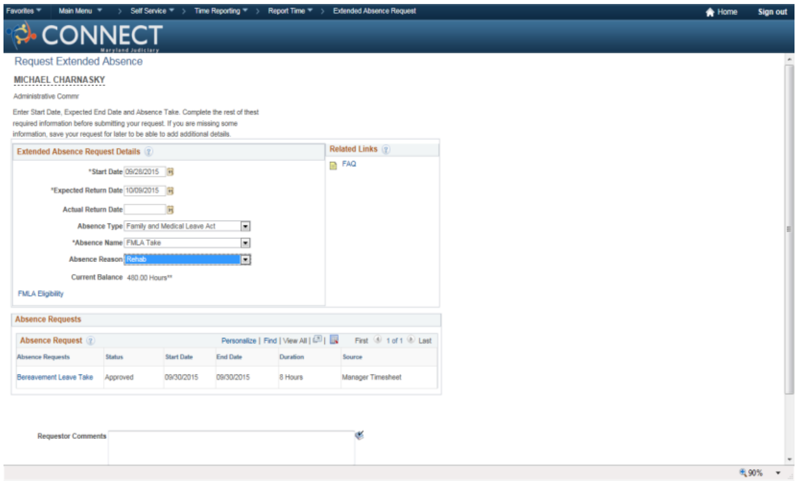
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	

Step	Action	Notes
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. Absence Request	
8.	Double-click in the **Start Date** field. 08/27/2015	
9.	To clear the field, Press **[Backspace]**.	
10.	Enter "**09/15/2015**" into the **Start Date** field.	
11.	Click the **Filter by Type** drop-down list. All	
12.	Click the **Personal Day** list item. Personal Day	
13.	Click the **Absence Name** drop-down list. Select Absence Name	
14.	Click the **Personal Leave Take** list item. Personal Leave Take	
15.	Depending on the Absence Name selected, the Current Balance for the Absence Name will be displayed. For example, Accident Leave Take will not display a current available balance.	
16.	Click the **Reason** drop-down list. Select Absence Reason	
17.	Click the **Personal Day** list item. Personal Day	
18.	If applicable, you can attach documentation to support your request. For this example, do not attach a document.	
19.	Click in the **Duration** field.	
20.	Enter "**80**" into the **Duration** field.	
21.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	

Step	Action	Notes
22.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 80 hours or 10 days.	
23.	Click the **Submit** button. Submit	
24.	Notice the message indicating you must forecast your balance before submitting the request.	
25.	Click the **Forecast Balance** button. Forecast Balance	
26.	This message is confirming the employee does **not** have enough leave to submit the absence request.	
27.	Click the **View Forecast Details** link. View Forecast Details	
28.	The Absence Forecast Results page indicates that the employee is INELIGIBLE to take 80 paid hours of Personal Leave Take. The employee only has 48 paid hours available.	
29.	Click the **Return to Absence Request** link. Return to Absence Request	
30.	Click the **Home** link. Home	
31.	Since the request was not able to be completed, Click the **No** button to discard the request. No	
32.	Click the **Sign out** link. Sign out	
33.	You have completed the Request Time Off - Insufficient Balance topic. **End of Procedure - Job Aid.**	

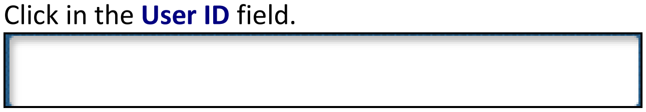
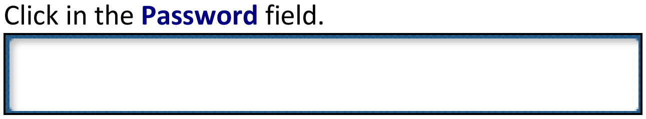
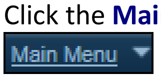
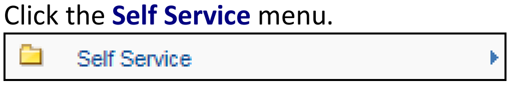
Request an Extended Absence - FMLA Timeframe

Request an Extended Absence - FMLA Timeframe



Procedure - Job Aid

In this topic, you will submit a request for a period of time where you will request to use FMLA.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	
9.	Click the **Time Reporting** menu. 	

Step	Action	Notes
10.	Click the **Report Time** menu. Report Time	
11.	Click the **Extended Absence Request** menu. Extended Absence Request	
12.	Double-click in the **Start Date** field. 08/27/2015	
13.	To clear the field, Press **[Backspace]**.	
14.	Enter "**09/28/2015**" into the **Start Date** field.	
15.	Click in the **Expected Return Date** field.	
16.	Enter "**10/9/2015**" into the **Expected Return Date** field.	
17.	Click the **Absence Type** drop-down list. All	
18.	Click the **Family and Medical Leave Act** list item. Family and Medical Leave Act	
19.	Click the **Absence Name** drop-down list. Select Absence Name	
20.	Click the **FMLA Take** list item. FMLA Take	
21.	Once the Absence Name FMLA Take is selected, the Current Balance is displayed on the page.	
22.	Click the **Absence Reason** drop-down list. Select Absence Reason	
23.	Click the **Rehab** list item. Rehab	
24.	Notice the page also displays previously submitted absence requests.	
25.	Click the **FMLA Eligibility** link. FMLA Eligibility	
26.	The FMLA Eligibility section will be populated based on employee job data.	
27.	Click the **Vertical** scrollbar to move down the page.	
28.	Double-click in the **Date Change Will Take Effect** field. 08/27/2015	

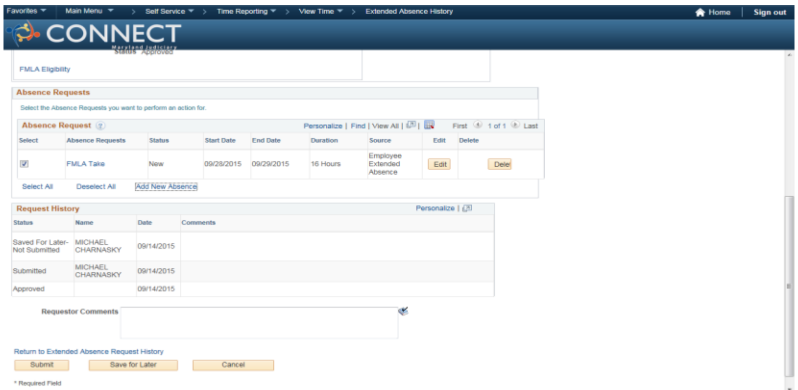
Step	Action	Notes
29.	To clear the field, Press **[Backspace]**.	
30.	Enter "**09/28/2015**" into the **Date Change Will Take Effect** field.	
31.	Click the **Validate Sections** button. Validate Sections	
32.	This message is confirming the employee is eligible to use FMLA. Click the **OK** button. OK	
33.	Click the **Return to Extended Absence Request** link. Return to Extended Absence Request	
34.	Click the **Save for Later** button. Save for Later	
35.	This message is confirming the request was saved. For this example, you will edit the request before submitting. Click the **OK** button. OK	
36.	Click the **Time Reporting** button. Time Reporting	
37.	Click the **View Time** menu. View Time	
38.	Click the **Extended Absence History** menu. Extended Absence History	
39.	Notice the FMLA Take Status for the request is Saved.	
40.	Click the **Edit** button. Edit	
41.	Click the **Medical Certificate (0)** link to add and/or view attachments. Medical Certificate (0)	
42.	Click the **Add Attachment** button. Add Attachment	
43.	Click in the **Subject** field.	
44.	Enter "**Medical Certificate**" into the **Subject** field.	
45.	Click the **Add Attachment** button. Add Attachment	

Step	Action	Notes
46.	Click the **Browse** button. Browse...	
47.	For this example, we are accessing the document from the Desktop. Click the **Medical Documents** list item. Medical Documents File folder	
48.	Click the **Open** button. Open	
49.	Click the **Medical Certificate** list item. Medical Certificate	
50.	Click the **Open** button. Open	
51.	Click the **Upload** button. Upload	
52.	Click the **Save** button. Save	
53.	Click the **Extended Absence Request** link. Extended Absence Request	
54.	Click the **Submit** button. Submit	
55.	Click the **Yes** button. Yes	
56.	Click the **OK** button. OK	
57.	Click the **Vertical** scrollbar to move down the page.	
58.	Notice the Medical Certificate indicates there is an attachment. Notice in the Request History section, the Status for the extended absence request is Submitted. Notice the submitted request is pending approval.	
59.	Click the **Home** link. Home	
60.	Click the **Sign out** link. Sign out	

Step	Action	Notes
61.	You have completed the Request an Extended Absence - FMLA Timeframe topic. **End of Procedure - Job Aid.**	

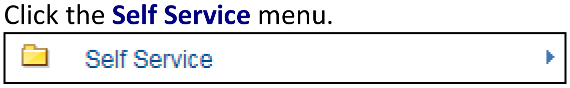
Request an Extended Absence - FMLA Take Days

Request an Extended Absence - FMLA Take Days



Procedure - Job Aid

In this topic, you will submit an extended absence request using FMLA.

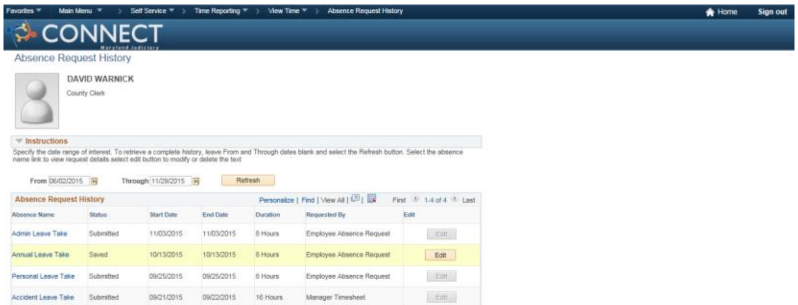
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	

Step	Action	Notes
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **View Time** menu. View Time	
11.	Click the **Extended Absence History** menu. Extended Absence History	
12.	Notice the Status of the request is Approved. Click the **Edit** button to add an absence during the approved timeframe. Edit	
13.	Click the **Vertical** scrollbar to move down the page.	
14.	Click the **Add New Absence** link. Add New Absence	
15.	Double-click in the **Start Date** field. 09/14/2015	
16.	To clear the field, Press **[Backspace]**.	
17.	Enter "**09/28/2015**" into the **Start Date** field.	
18.	Click the **Filter by Type** drop-down list. All	
19.	Click the **Family and Medical Leave Act** list item. Family and Medical Leave Act	
20.	Click the **Absence Name** drop-down list. Select Absence Name	
21.	Click the **FMLA Take** list item. FMLA Take	
22.	Click the **Reason** drop-down list. Select Absence Reason	
23.	Click the **FMLA Medical** list item. FMLA Medical	
24.	The Current Balance is displayed.	
25.	Click in the **Duration** field.	
26.	Enter "**16**" into the **Duration** field.	

Step	Action	Notes
27.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
28.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 16 hours or 2 days.	
29.	Click the **Vertical** scrollbar to move down the page.	
30.	Click the **OK** button to return to the previous page. OK	
31.	You can see the absence request in the Absence Requests section with a Status as New. Click the **Submit** button. Submit	
32.	Click the **Yes** button. Yes	
33.	Click the **OK** button. OK	
34.	Click the **Vertical** scrollbar to move down the page.	
35.	After submission, the Status for the FMLA Take is now Approved.	
36.	Click the **Vertical** scrollbar to move back up the page.	
37.	Click the **Home** link. Home	
38.	Click the **Sign out** link. Sign out	
39.	You have completed the request an Extended Absence - FMLA Take Days topic. **End of Procedure - Job Aid.**	

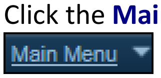
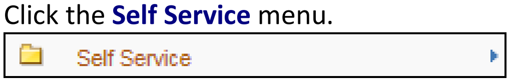
Modify a Saved Absence Request

Modify a Saved Absence Request



Procedure - Job Aid

In this topic, you will make changes to a saved absence request.

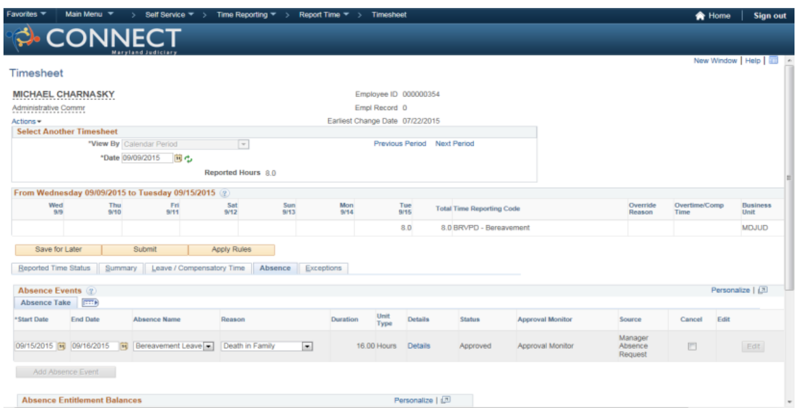
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	

Step	Action	Notes
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **View Time** menu. View Time	
11.	Click the **Absence Request History** menu. Absence Request History	
12.	The Absence Request History page will pull up absence requests within a 6 month time frame. You can change the dates in the From and Through calendar fields.	
13.	Notice the Status is Saved for the highlighted absence. You are not able to edit requests that have already been submitted from this page. Click the **Edit** button. Edit	
14.	For this example, we are changing the Start Date which will also change the Duration. Double-click in the **Start Date** field. 10/13/2015	
15.	To clear the field, Press **[Backspace]**.	
16.	Enter "**10/09/2015**" into the **Start Date** field.	
17.	Click in the **Duration** field. 8.00	
18.	To clear the field, Press **[Backspace]**.	
19.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
20.	Click the **Forecast Balance** button. Forecast Balance	
21.	This message is confirming the employee has enough leave to submit the absence request.	
22.	Click the **Vertical** scrollbar to move down the page.	
23.	Click the **Submit** button. Submit	
24.	Click the **Yes** button. Yes	

Step	Action	Notes
25.	Click the **OK** button. OK	
26.	After submission, the absence request Status changes from Saved For Later to Submitted and is routed to the employee's Manager for approval.	
27.	Click the **Home** link. Home	
28.	Click the **Sign out** link. Sign out	
29.	You have completed the Modify a Saved Absence Request topic. **End of Procedure - Job Aid.**	

Modify an Absence Request from Timesheet

Modify an Absence Request from Timesheet



Procedure - Job Aid

In this topic, you will make changes to a previously submitted absence request from an employee's elapsed timesheet.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	

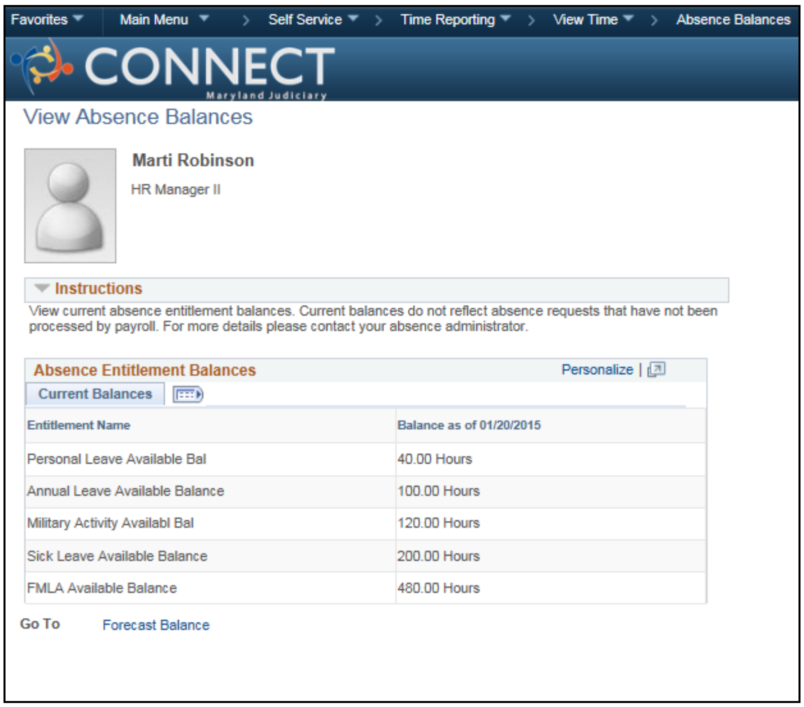
Step	Action	Notes
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. Main Menu	
8.	Click the **Self Service** menu. Self Service	
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **Report Time** menu. Report Time	
11.	Click the **Timesheet** menu. Timesheet	
12.	For this example, we are editing an absence request submitted for the week of 9/9/2015. Notice Tue 9/15 already has the approved absence posted.	
13.	Click the **Absence** tab. Absence	
14.	Click the **Edit** button. Edit	
15.	Click the **Details** link. Details	
16.	Double-click in the **End Date** field. 09/16/2015	
17.	To clear the field, Press **[Backspace]**.	
18.	Enter "**09/15/2015**" into the **End Date** field.	
19.	Click the **Absence Name** drop-down list. Bereavement Leave Take	
20.	Click the **Admin Leave Take** list item. Admin Leave Take	

Step	Action	Notes
21.	This message is alerting you that a change has been made to the absence. Click the **Yes** button. Yes	
22.	Click the **Reason** drop-down list. Select Absence Reason	
23.	Click the **Other** list item. Other	
24.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
25.	Click the **Vertical** scrollbar to move down the page.	
26.	Click the **OK** button. OK	
27.	The changes made to the absence request were the End Date, Absence Name, and Duration.	
28.	Click the **Submit** button. Submit	
29.	This message is alerting you that documentation may be required to support this absence request. Click the **OK** button. OK	
30.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. OK	
31.	Click the **OK** button. OK	
32.	After the changes were submitted, the Status changes from Approved to Needs Approval.	
33.	Click the **Home** link. Home	
34.	Click the **Sign out** link. Sign out	

Step	Action	Notes
35.	You have completed the Modify an Absence Request from Timesheet topic. **End of Procedure - Job Aid.**	

View Absence Balances

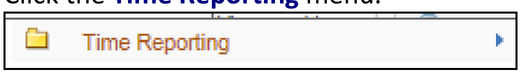
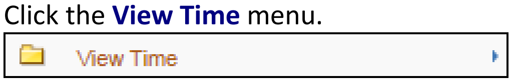
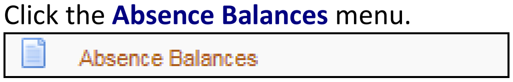
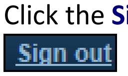
Through Employee Self Service you will have access to view your absence balance.



Procedure - Job Aid

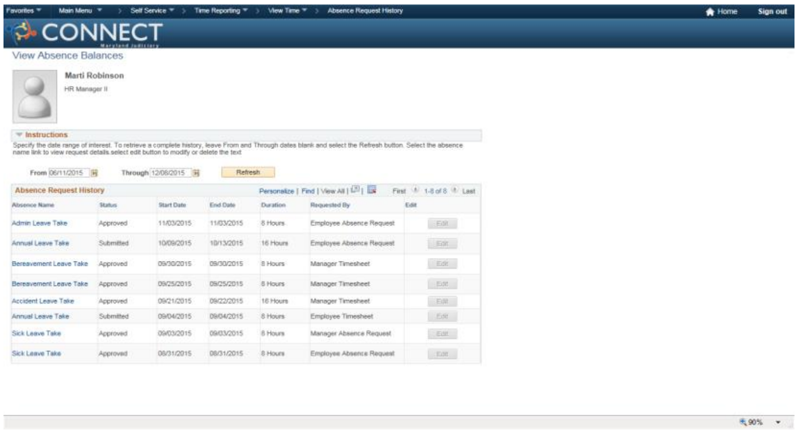
In this topic, an employee will view their current available absence balances.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**marti.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	
9.	Click the **Time Reporting** menu. 	
10.	Click the **View Time** menu. 	
11.	Click the **Absence Balances** menu. 	
12.	You can view your available balances by absence type. The current balance will be as of the last pay period.	
13.	Click the **Home** link. 	
14.	Click the **Sign out** link. 	
15.	You have completed the View Absence Balances topic. **End of Procedure - Job Aid.**	

View Absence History

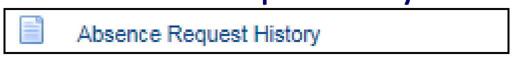
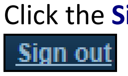
View Absence History



Procedure - Job Aid

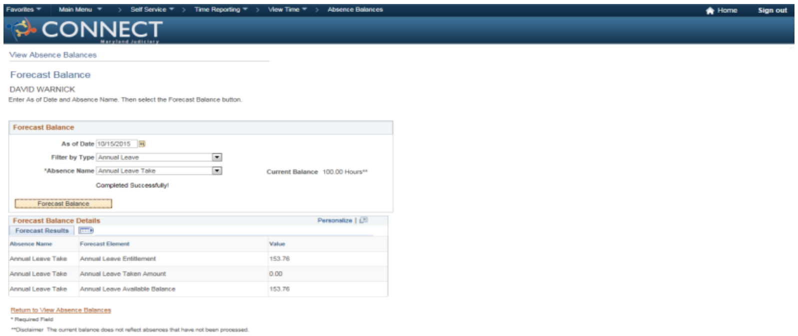
In this topic, an employee will view a history of their absence requests.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**marti.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. Main Menu	
8.	Click the **Self Service** menu. Self Service	

Step	Action	Notes
9.	Click the **Time Reporting** menu. 	
10.	Click the **View Time** menu. 	
11.	Click the **Absence Request History** menu. 	
12.	Notice the From and Through date fields. You can specify any date range you desire or leave the fields blank to display a complete history. If you change the dates, click the Refresh button to update the display.	
13.	You can view the absence request history. The Status column will display if the absence was Approved, Submitted, Saved, or Denied.	
14.	Click the **Home** link. 	
15.	Click the **Sign out** link. 	
16.	You have completed the View Absence History topic. **End of Procedure - Job Aid.**	

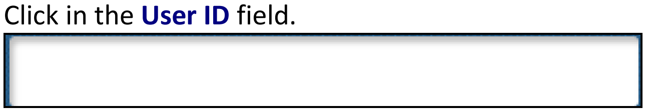
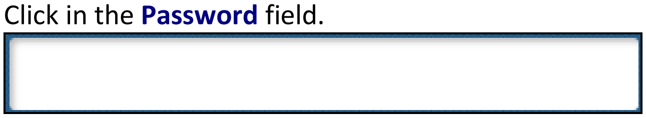
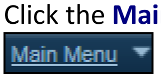
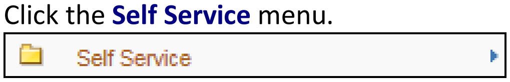
Leave Balance Forecasting

Leave Balance Forecasting



Procedure - Job Aid

In this topic, you will forecast the amount of leave available on a specific date prior to submitting an absence request.

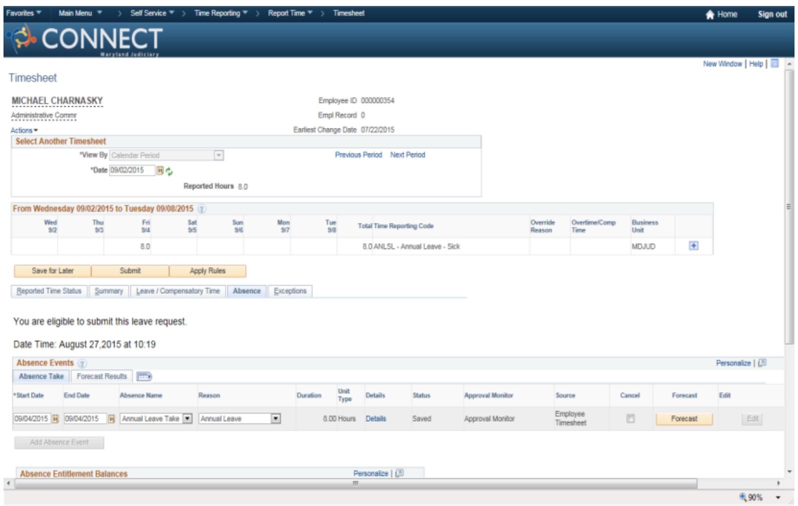
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	

Step	Action	Notes
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **View Time** menu. View Time	
11.	Click the **Absence Balances** menu. Absence Balances	
12.	The View Absence Balances page allows an employee to view their available balances by absence type. The current balance will be as of the last pay period.	
13.	Click the **Forecast Balance** link. Forecast Balance	
14.	Double-click in the **As of Date** field. 08/31/2015	
15.	To clear the field, Press **[Backspace]**.	
16.	Enter "**10/15/2015**" into the **As of Date** field.	
17.	Click the **Filter by Type** drop-down list. All	
18.	Click the **Annual Leave** list item. Annual Leave	
19.	Click the **Absence Name** drop-down list. Select Absence Name	
20.	Click the **Annual Leave Take** list item. Annual Leave Take	
21.	Depending on the Absence Name selected, the Current Balance for the Absence Name will be displayed. For example, Accident Leave Take will not display a current available balance.	
22.	Click the **Forecast Balance** button. Forecast Balance	
23.	This message indicates that your forecast was successful. In the Forecast Balance Details section, you will have 153.76 hours of Annual Leave Take available on 10/15/2015.	
24.	Click the **Return to View Absence Balances** link. Return to View Absence Balances	

Step	Action	Notes
25.	Click the **Home** link. 	
26.	Click the **Sign out** link. 	
27.	You have completed the Leave Balance Forecasting topic. **End of Procedure - Job Aid.**	

Request Absence from a Timesheet with Forecasting

Request Absence from a Timesheet with Forecasting

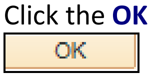
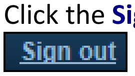


Procedure - Job Aid

In this topic, you will request time off from an employee's elapsed timesheet. You will ensure you are eligible to request annual leave by forecasting prior to submission.

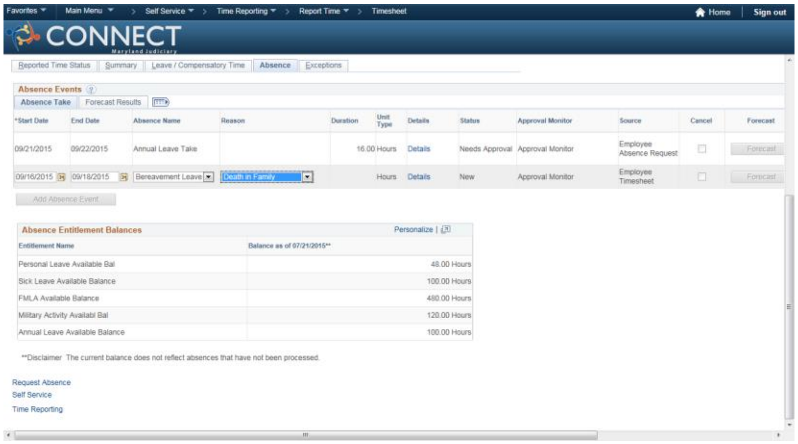
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**michael.charnasky**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Timesheet** link. Timesheet	
8.	Click the **Absence** tab. Absence	
9.	Click the **Add Absence Event** button. Add Absence Event	
10.	Double-click in the **Start Date** field. 09/02/2015	
11.	To clear the field, Press **[Backspace]**.	
12.	Enter "**09/04/2015**" into the **Start Date** field.	
13.	Double-click in the **End Date** field. 09/02/2015	
14.	Enter "**09/04/2015**" into the **End Date** field.	
15.	Click the **Absence Name** drop-down list. Select Absence Nan	
16.	Click the **Annual Leave Take** list item. Annual Leave Take	
17.	Click the **Reason** drop-down list. Select Absence Reasor	
18.	Click the **Annual Leave** list item. Annual Leave	
19.	Click the **Details** link. Details	
20.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
21.	The Duration will automatically populate if the Start Date and End Date fields are completed. For this example, the employee requested 1 day off or 8 hours.	

Step	Action	Notes
22.	Click the **OK** button. 	
23.	Click the **Forecast** button. 	
24.	This message is confirming the employee has enough leave to submit the absence request.	
25.	Click the **Submit** button. 	
26.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. 	
27.	Click the **OK** button. 	
28.	The Status for the absence request is Needs Approval.	
29.	Click the **Home** link. 	
30.	Click the **Sign out** link. 	
31.	You have completed the Request Absence from a Timesheet with Forecasting topic. **End of Procedure - Job Aid.**	

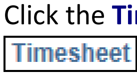
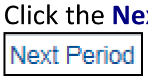
Request Absence from a Timesheet without Balance Forecasting

Request Absence from a Timesheet without Balance Forecasting



Procedure - Job Aid

In this topic, you will request time off from an employee's elapsed timesheet for bereavement as an employee. Bereavement is not accrued and does not require forecasting.

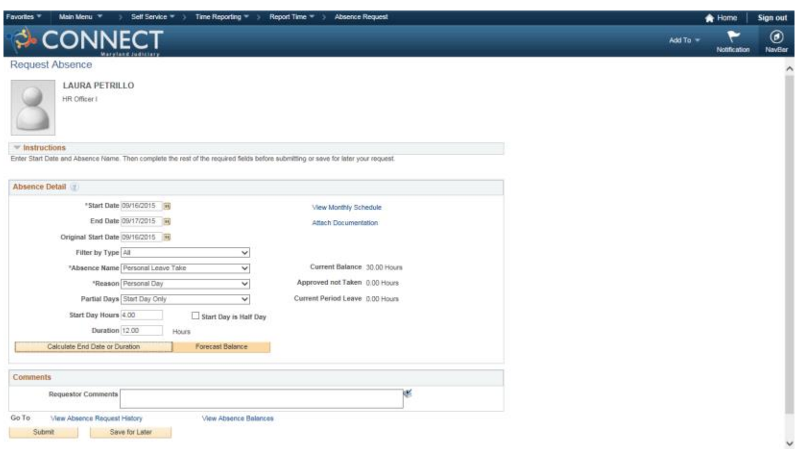
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Timesheet** link. 	
8.	Click the **Next Period** link. 	

Step	Action	Notes
9.	Notice the employee has already submitted an absence request for 16 hours of Annual Leave - Sick. Click the **Absence** tab. Absence	
10.	Click the **Add Absence Event** button. Add Absence Event	
11.	Click the **Vertical** scrollbar to move down the page.	
12.	Double-click in the **End Date** field. 09/16/2015	
13.	To clear the field, Press **[Backspace]**.	
14.	Enter "**09/18/2015**" into the **End Date** field.	
15.	Click the **Absence Name** drop-down list. Select Absence Nan	
16.	Click the **Bereavement Leave Take** list item. Bereavement Leave Take	
17.	Click the **Reason** drop-down list. Select Absence Reasor	
18.	Click the **Death in Family** list item. Death in Family	
19.	Click the **Details** link. Details	
20.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
21.	The Duration will automatically populate if the Start Date and End Date fields are completed. For this example, the employee requested 3 days off or 24 hours.	
22.	Click the **OK** button. OK	
23.	Click the **Submit** button. Submit	
24.	To acknowledge the message for documentation, Click the **OK** button. OK	

Step	Action	Notes
25.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. OK	
26.	Click the **OK** button. OK	
27.	The Status for the absence request is Needs Approval.	
28.	Click the **Home** link. Home	
29.	Click the **Sign out** link. Sign out	
30.	You have completed the Request Absence from a Timesheet without Balance Forecasting topic. **End of Procedure - Job Aid.**	

Request Time Off - Partial Start Day Only

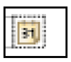
Request Time Off - Partial Start Day Only

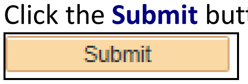
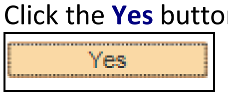
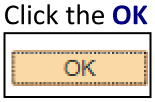


Procedure - Job Aid

In this topic, you will request time off for 1 partial workday and 1 full workday. The partial workday occurs on the first day of the absence request.

Step	Action	Notes
1.	Enter "**lolli.petrillo**" into the **User ID** field.	
2.	Click in the **Password** field.	

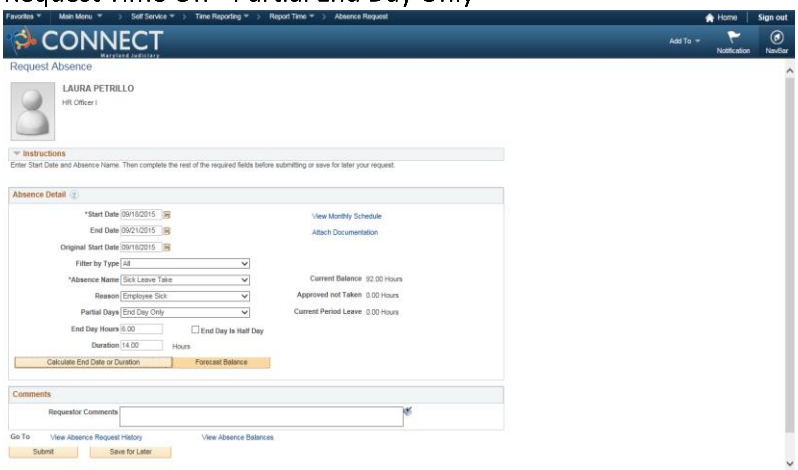
Step	Action	Notes
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. Sign In	
5.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
6.	Click the **Absence Request** link. Absence Request	
7.	Click the **Choose a date** button. 	
8.	Click the **16** object. 16	
9.	Click the **Absence Name** drop-down list. Select Absence Name	
10.	Click the **Personal Leave Take** list item. Personal Leave Take	
11.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed. For example, Accident Leave Take, which does not accrue time, will not display a current available balance.	
12.	Click the **Reason** drop-down list. Select Absence Reason	
13.	Click the **Personal Day** list item. Personal Day	
14.	Click the **Partial Days** drop-down list. None	
15.	Selecting Start Day Only indicates that the partial day will occur on the first day of the absence request. Click the **Start Day Only** list item. Start Day Only	

Step	Action	Notes
16.	In the Start Day Hours field, you would enter the hours that you will be absent from work on the Start Day. Click in the **Start Day Hours** field. 	
17.	Enter "**4**" into the **Start Day Hours** field.	
18.	You can select the Start Day is Half Day option if the partial day absence request will be half of your normal workday.	
19.	Click in the **Duration** field. 	
20.	In the Duration field, you enter the total number of hours you will be absent from work. Enter "**12**" into the **Duration** field.	
21.	Click the **Calculate End Date or Duration** button. 	
22.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 4 hours on 9/16/2015 and 8 hours on 9/17/2015 = 12 total hours.	
23.	Click the **Forecast Balance** button. 	
24.	This message is confirming the employee has enough leave to submit the absence request.	
25.	Click the **Vertical** scrollbar to move down the page.	
26.	Make sure to review your inputs before submitting. Click the **Submit** button. 	
27.	Click the **Yes** button to submit. 	
28.	Click the **OK** button. 	
29.	The Absence Request shows a Submitted Status and Pending approval by the Manager.	

Step	Action	Notes
30.	Click the **Home** link. Home	
31.	Click the **Sign out** link. Sign out	
32.	You have completed the Request Time Off - Partial Start Day Only topic. **End of Procedure - Job Aid.**	

Request Time Off - Partial End Day Only

Request Time Off - Partial End Day Only



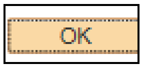
Procedure - Job Aid

In this topic, you will request time off for 1 partial workday and 1 full workday. The partial workday occurs on the last day of the absence request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	

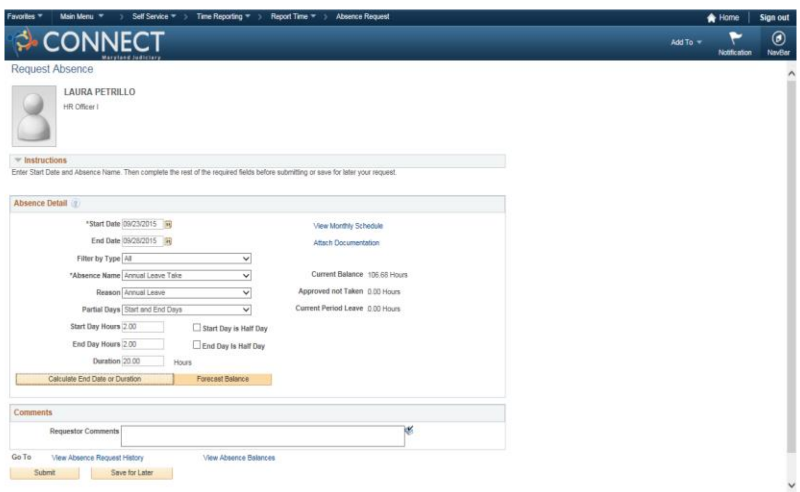
Step	Action	Notes
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. Absence Request	
8.	Click the **Choose a date** button.	
9.	Click the **18** object. 18	
10.	Click the **Absence Name** drop-down list. Select Absence Name	
11.	Click the **Sick Leave Take** list item. Sick Leave Take	
12.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed. For example, Accident Leave Take, which does not accrue time, will not display a current available balance.	
13.	Click the **Reason** drop-down list. Select Absence Reason	
14.	Click the **Employee Sick** list item. Employee Sick	
15.	Click the **Partial Days** drop-down list. None	
16.	Selecting End Day Only indicates that the partial day will occur on the last day of the absence request. Click the **End Day Only** list item. End Day Only	
17.	In the End Day Hours field, you would enter the hours that you will be absent from work on the End Day. Click in the **End Day Hours** field.	
18.	Enter "**6**" into the **End Day Hours** field.	

Step	Action	Notes
19.	You can select the End Day is Half Day option if the partial day absence request will be half of your normal workday.	
20.	Click in the **Duration** field.	
21.	In the Duration field, you enter the total number of hours you will be absent from work. Enter "**14**" into the **Duration** field.	
22.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
23.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 8 hours on 9/18/2015 and 6 hours on 9/21/2015 = 14 total hours.	
24.	Click the **Forecast Balance** button. Forecast Balance	
25.	This message is confirming the employee has enough leave to submit the absence request.	
26.	Click the **Vertical Scrollbar** to scroll down the page.	
27.	Make sure to review your inputs before submitting. Click the **Submit** button. Submit	
28.	This message is notifying you that documentation may be required to support this absence request. Click the **OK** button. OK	
29.	This message is notifying you that requesting 3 or more days of sick leave may be requested as FMLA. For this example, the absence type selected was Sick Leave Take. Click the **OK** button. OK	
30.	Click the **Yes** button to submit. Yes	

Step	Action	Notes
31.	Click the **OK** button. 	
32.	The Absence Request shows a Submitted Status and Pending approval by the Manager.	
33.	Click the **Home** link. 	
34.	Click the **Sign out** link. 	
35.	You have completed the Request Time Off - Partial End Day Only topic. **End of Procedure - Job Aid.**	

Request Time Off - Partial Start and End Days

Request Time Off - Partial Start and End Days



Procedure - Job Aid

In this topic, you will request time off for 2 partial workdays and 2 full workdays. The partial workdays will occur on the first day and on the last day of the absence request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. Absence Request	
8.	Click the **Choose a date** button.	
9.	Click the **23** object. 23	
10.	Click the **Absence Name** drop-down list. Select Absence Name	
11.	Click the **Annual Leave Take** list item. Annual Leave Take	
12.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed. For example, Accident Leave Take, which does not accrue time, will not display a current available balance.	
13.	Click the **Reason** drop-down list. Select Absence Reason	
14.	Click the **Annual Leave** list item. Annual Leave	
15.	Click the **Partial Days** drop-down list. None	
16.	Selecting Start and End Days indicates that the partial day will occur on the first day of the absence request **AND** on the last day. Click the **Start and End Days** list item. Start and End Days	

Step	Action	Notes
17.	In the Start Day Hours field, you would enter the hours that you will be absent from work on the Start Day. Click in the **Start Day Hours** field.	
18.	Enter "**2**" into the **Start Day Hours** field.	
19.	In the End Day Hours field, you would enter the hours that you will be absent from work on the End Day. Click in the **End Day Hours** field.	
20.	Enter "**2**" into the **End Day Hours** field.	
21.	You can select the Start Day is Half Day option and/or the End Day is Half Day option if the partial day absence request will be half of your normal workday.	
22.	Click in the **Duration** field.	
23.	In the Duration field, you enter the total number of hours you will be absent from work. Enter "**20**" into the **Duration** field.	
24.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
25.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 2 hours on 9/23/2015, 8 hours on 9/24/2015, 8 hours on 9/25/2015, and 2 hours on 9/28/2015 = 20 total hours.	
26.	Click the **Forecast Balance** button. Forecast Balance	
27.	This message is confirming the employee has enough leave to submit the absence request.	
28.	Click the **Vertical Scrollbar** to scroll down the page.	
29.	Make sure to review your inputs before submitting. Click the **Submit** button. Submit	

Step	Action	Notes
30.	Click the **Yes** button to submit. Yes	
31.	Click the **OK** button. OK	
32.	The Absence Request shows a Submitted Status and Pending approval by the Manager.	
33.	Click the **Home** link. Home	
34.	Click the **Sign out** link. Sign out	
35.	You have completed the Request Time Off - Partial Start and End Days topic. **End of Procedure - Job Aid.**	

Request Time Off - All Days

Procedure - Job Aid

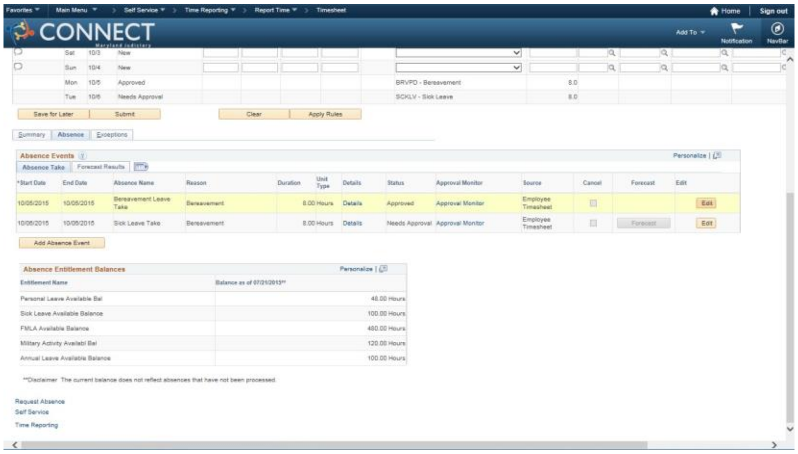
In this topic, you will request partial time off for multiple workdays.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. Absence Request	

Step	Action	Notes
8.	For this example, we are submitting an absence request for 4 hours per day for 4 consecutive work days.	
9.	Click the **Choose a date** button.	
10.	Click the **29** object. 29	
11.	Click the **Filter by Type** drop-down list. All	
12.	Click the **Annual Leave** list item. Annual Leave	
13.	Click the **Absence Name** drop-down list. Select Absence Name	
14.	Click the **Annual Leave Take** list item. Annual Leave Take	
15.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed. For example, Accident Leave Take, which does not accrue time, will not display a current available balance.	
16.	Click the **Reason** drop-down list. Select Absence Reason	
17.	Click the **Annual Leave** list item. Annual Leave	
18.	Click the **Partial Days** drop-down list. None	
19.	Selecting All Days indicates that the partial day will occur every day of the absence request for the same number of hours per day. Click the **All Days** list item. All Days	
20.	In the All Days Hours field, you would enter the hours that you will be absent from work each day. Click in the **All Days Hours** field.	
21.	Enter "**4**" into the **All Days Hours** field.	

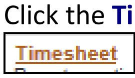
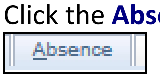
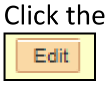
Step	Action	Notes
22.	You can select the All Days is Half Days option if the partial day absence request will be half of your normal workday.	
23.	Click in the **Duration** field.	
24.	In the Duration field, you enter the total number of hours you will be absent from work. Enter "**16**" into the **Duration** field.	
25.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
26.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 4 hours per day from Tuesday through Friday = 16 total hours.	
27.	Click the **Forecast Balance** button. Forecast Balance	
28.	This message is confirming the employee has enough leave to submit the absence request.	
29.	Click the **Vertical** scrollbar to move down the page.	
30.	Make sure to review your inputs before submitting. Click the **Submit** button. Submit	
31.	Click the **Yes** button to submit. Yes	
32.	Click the **OK** button. OK	
33.	The Absence Request shows a Submitted Status and Pending approval by the Manager.	
34.	Click the **Home** link. Home	
35.	Click the **Sign out** link. Sign ou	
36.	You have completed the Request Time Off - All Days topic. **End of Procedure - Job Aid.**	

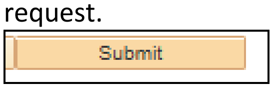
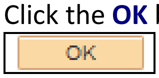
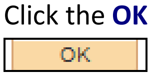
Canceling Absence Request from Timesheet



Procedure - Job Aid

In this topic, you will cancel absence requests posted on the timesheet page. One absence has already been approved, another absence will be pending approval.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**donald.duck**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Timesheet** link. 	
7.	Employee Donald Duck is using a punch timesheet.	
8.	Click the **Absence** tab. 	
9.	Click the **Vertical** scrollbar to move down the page.	
10.	Click the **Edit** button for the Approved absence. 	
11.	Click the **Cancel** option. 	

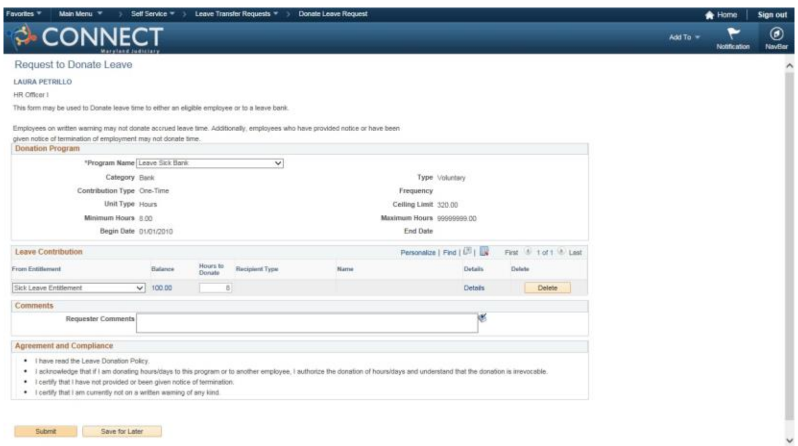
Step	Action	Notes
12.	Click the **Submit** button to make the change to the absence request. 	
13.	To acknowledge documentation may be required, Click the **OK** button. 	
14.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. 	
15.	Click the **OK** button. 	
16.	Notice the Approved absence has been removed from the Absence Events section. Click the **Edit** button for the absence request that is pending approval. 	
17.	Click the **Cancel** option. 	
18.	Click the **Submit** button to make the change to the absence request. 	
19.	To acknowledge documentation may be required, Click the **OK** button. 	
20.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. 	
21.	Click the **OK** button. 	
22.	Notice both absence requests have been removed from the Absence Events section.	

Step	Action	Notes
23.	Click the **Home** link. Home	
24.	Click the **Sign out** link. Sign out	
25.	You have completed the Canceling Absence Request from Timesheet topic. **End of Procedure - Job Aid.**	

Managing Leave Bank

Leave Bank Enrollment

Employees can enroll in the leave bank program with a minimum donation of 8 hours.

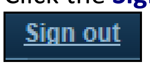


Procedure - Job Aid

In this topic, you will enroll in the leave bank program by submitting a leave donation request for sick leave.

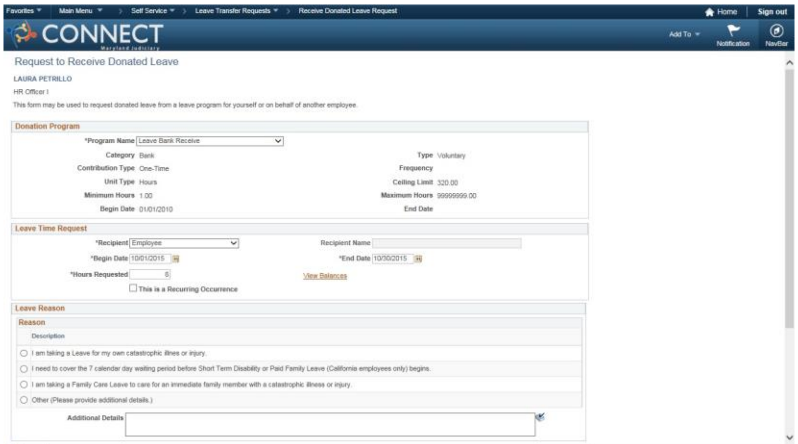
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. Main Menu	
8.	Click the **Self Service** menu. Self Service	
9.	Click the **Leave Transfer Requests** menu. Leave Transfer Requests	
10.	Click the **Donate Leave Request** menu. Donate Leave Request	
11.	For this example, you are submitting a request to donate sick leave to the Leave Sick Bank program. The initial donation to any leave bank will serve as enrollment into the leave bank program.	
12.	Click the **Program Name** drop-down list. Select Program	
13.	Click the **Leave Sick Bank** list item. Leave Sick Bank	
14.	Click the **From Entitlement** drop-down list. Select Entitlement	
15.	Click the **Sick Leave Entitlement** list item. Sick Leave Entitlement	
16.	The **Balance** column displays the employee's current available balance. For this example, you have 100 hours of sick leave to donate.	
17.	Click in the **Hours to Donate** field.	
18.	Enter "**8**" into the **Hours to Donate** field.	
19.	Review the **Agreement and Compliance** section.	

Step	Action	Notes
20.	Click the **Submit** button. 	
21.	Click the **Yes** button. 	
22.	Click the **OK** button. 	
23.	After submission, leave donation will be sent for approval by the employee's Manager, Marti Robinson. Once approved, employee will be enrolled in the leave bank program.	
24.	Click the **Home** link. 	
25.	Click the **Sign out** link. 	
26.	You have completed the Leave Bank Enrollment topic. **End of Procedure - Job Aid.**	

Request to Receive Leave Bank Donation

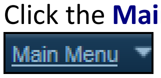
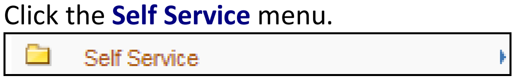
Once enrolled in the leave bank program, an employee can request to receive donated leave from the leave bank.



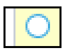
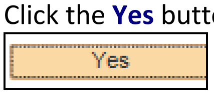
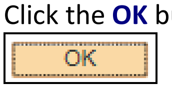
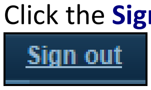
Procedure - Job Aid

In this topic, you will submit a request to receive a donation from the leave bank.

A request to receive a leave donation is only for employees enrolled in a leave bank program.

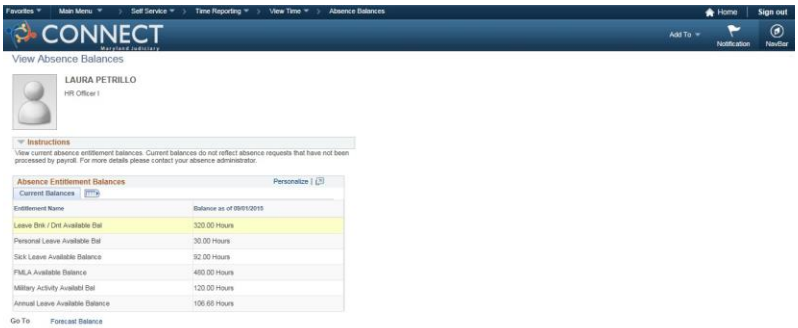
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	

Step	Action	Notes
9.	Click the **Leave Transfer Requests** menu. Leave Transfer Requests	
10.	Click the **Receive Donated Leave Request** menu. Receive Donated Leave Request	
11.	An employee enrolled in the leave bank program can only request leave from the leave bank if: 1. All available leave banks are exhausted; 2. Leave is exhausted because of a prolonged or serious medical condition; 3. The employee is in good standings on past leave usage, disciplinary and performance ratings. For this example, you are requesting to receive 8 hours from the Leave Bank Receive Program to be used in the month of October 2015.	
12.	Click the **Program Name** drop-down list. Select Program	
13.	Click the **Leave Bank Receive** list item. Leave Bank Receive	
14.	Click the **Choose a date** button. 31	
15.	Click the drop-down list. September	
16.	Click the **October** list item. October	
17.	Click the **1** object. 1	
18.	Click the **Choose a date** button. 31	
19.	Click the drop-down list. September	
20.	Click the **October** list item. October	
21.	Click the **30** object. 30	
22.	Click in the **Hours Requested** field.	

Step	Action	Notes
23.	Enter "**8**" into the **Hours Requested** field.	
24.	Click the **View Balances** link to view the employee's current available balances. 	
25.	Click the **Return to Receive Donated Leave Request** link. 	
26.	Click the **Vertical Scrollbar** to scroll down the page.	
27.	Click the **Other** option. 	
28.	Click in the **Additional Details** field.	
29.	Enter "**Family issues**" into the **Additional Details** field.	
30.	Review the **Agreement and Compliance** section.	
31.	Click the **Submit** button. 	
32.	Click the **Yes** button. 	
33.	Click the **OK** button. 	
34.	After submission, the request to receive a leave donation will be sent for approval by Employee Relations.	
35.	Click the **Home** link. 	
36.	Click the **Sign out** link. 	
37.	You have completed the Request to Receive Leave Bank Donation topic. **End of Procedure - Job Aid.**	

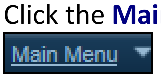
View Leave Bank/Donation Balance

An employee can view their absence balances. Included as an absence balance, is the leave bank/donation available balance.



Procedure - Job Aid

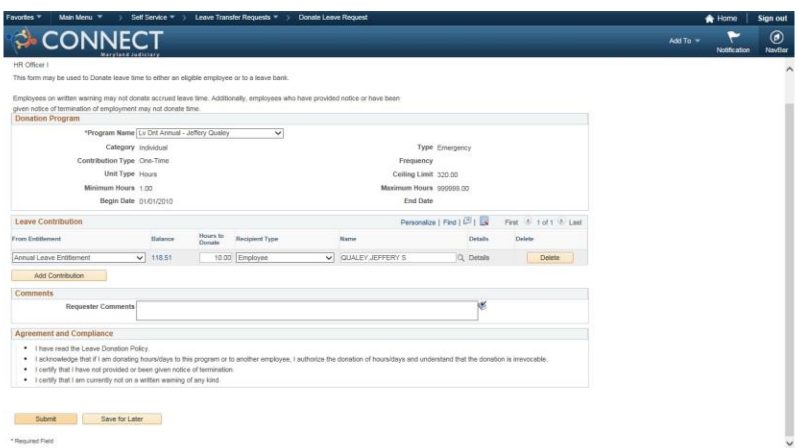
In this topic, you will view the leave bank/donation balance.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	

Step	Action	Notes
9.	Click the **Time Reporting** menu. Time Reporting	
10.	Click the **View Time** menu. View Time	
11.	Click the **Absence Balances** menu. Absence Balances	
12.	This page displays all of the employees' available absence balances including the available balance for Leave Bank/Donation.	
13.	Click the **Home** link. Home	
14.	Click the **Sign out** link. Sign out	
15.	You have completed the View Leave Bank/Donation Balance topic. **End of Procedure - Job Aid.**	

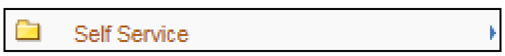
Donate Annual Leave to an Individual

An employee enrolled in the leave bank program can also donate to a specific individual.



Procedure - Job Aid

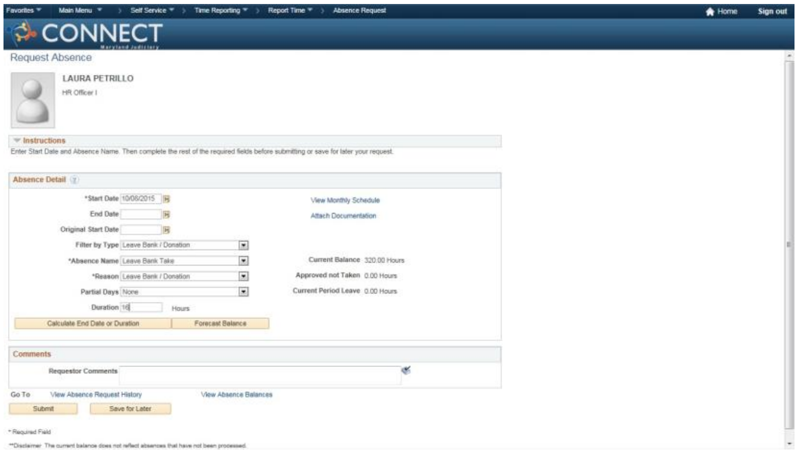
In this topic, you will donate annual leave to an individual employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Main Menu** button. 	
8.	Click the **Self Service** menu. 	
9.	Click the **Leave Transfer Requests** menu. 	
10.	Click the **Donate Leave Request** menu. 	
11.	For this example, you are donating annual leave to a Leave Donate Annual Bank Program setup for Jeffrey Qualey.	
12.	Click the **Program Name** drop-down list. 	
13.	Click the **Lv Dnt Annual - Jeffery Qualey** list item. 	
14.	Click the **From Entitlement** drop-down list. 	
15.	Click the **Annual Leave Entitlement** list item. 	
16.	The **Balance** column displays the employee's current available balance. For this example, you have 118.51 hours of annual leave to donate.	
17.	Click in the **Hours to Donate** field. 	

Step	Action	Notes
18.	Enter "**10**" into the **Hours to Donate** field.	
19.	Click the **Recipient Type** drop-down list.	
20.	Click the **Employee** list item. Employee	
21.	Click the **Look up** button.	
22.	Click in the **Search by: Name** field.	
23.	Enter "**qualey**" into the **Search by: Name** field.	
24.	Click the **Look Up** button. Look Up	
25.	Click the **QUALEY,JEFFERY S** link. QUALEY,JEFFERY S	
26.	Review the **Agreement and Compliance** section.	
27.	Click the **Submit** button. Submit	
28.	Click the **Yes** button. Yes	
29.	Click the **OK** button. OK	
30.	After submission, leave donation to an individual will be sent for approval by Employee Relations.	
31.	Click the **Home** link. Home	
32.	Click the **Sign out** link. Sign out	
33.	You have completed the Donate Annual Leave to an Individual topic. **End of Procedure - Job Aid.**	

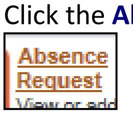
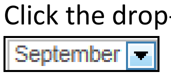
Request Time Off with Leave Bank/Donation

An employee can request an absence using leave bank/donation.



Procedure - Job Aid

In this topic, you will request time off using leave bank donation as an employee.

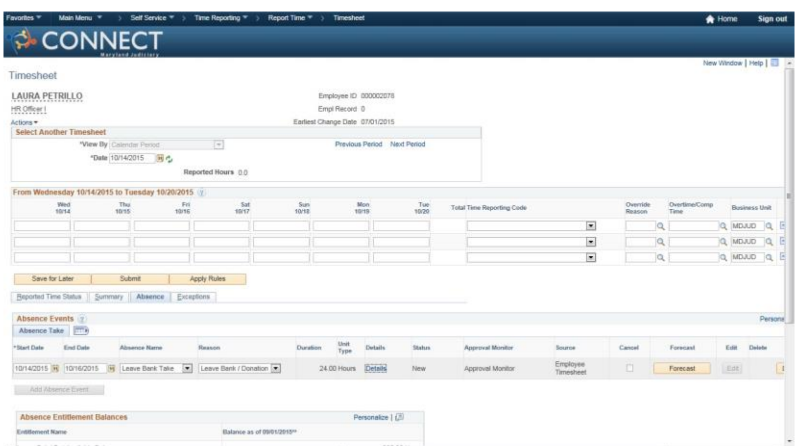
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Absence Request** link. 	
8.	Click the **Choose a date** button. 	
9.	Click the drop-down list. 	

Step	Action	Notes
10.	Click the **October** list item. October	
11.	Click the **8** object. 8	
12.	Click the **Filter by Type** drop-down list. All	
13.	Click the **Leave Bank / Donation** list item. Leave Bank / Donation	
14.	Click the **Absence Name** drop-down list. Select Absence Name	
15.	Click the **Leave Bank Take** list item. Leave Bank Take	
16.	Click the **Reason** drop-down list. Select Absence Reason	
17.	Click the **Leave Bank / Donation** list item. Leave Bank / Donation	
18.	The Current Balance for Leave Bank Take will appear.	
19.	Click in the **Duration** field.	
20.	Enter "**16**" into the **Duration** field.	
21.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
22.	The End Date automatically populates the last date of the absence request based on the hours of Duration. For this example, the employee requested 16 hours or 2 days.	
23.	Click the **Forecast Balance** button. Forecast Balance	
24.	This message is confirming the employee has enough leave to submit the absence request.	
25.	Click the **Submit** button. Submit	
26.	To acknowledge the message for documentation, Click the **OK** button. OK	

Step	Action	Notes
27.	Click the **Yes** button to submit. Yes	
28.	Click the **OK** button. OK	
29.	Click the **Vertical** scrollbar to move down the page.	
30.	The Absence Request shows a Submitted Status and Pending approval by the Manager.	
31.	Click the **Home** link. Home	
32.	Click the **Sign out** link. Sign out	
33.	You have completed the Request Time Off with Leave Bank/Donation topic. **End of Procedure - Job Aid.**	

Request Time Off from a Timesheet with Leave Bank/Donation

An employee can request an absence using leave bank/donation from their timesheet page.



Procedure - Job Aid

In this topic, you will request time off from an employee's elapsed timesheet using leave bank donation.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lolli.petrillo**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	The CONNECT HCM home page includes "pagelets" which is a small window that provides quick access and view to summary information. It also includes the **Employee Self Service Links** pagelet which allows for quick navigation to the most visited CONNECT pages.	
7.	Click the **Timesheet** link. Timesheet	
8.	Click the **Absence** tab. Absence	
9.	Click the **Add Absence Event** button. Add Absence Event	
10.	Click the **Choose a date** button. 31	
11.	Click the **Absence Name** drop-down list. Select Absence Nan	
12.	Click the **Leave Bank Take** list item. Leave Bank Take	
13.	Click the **Reason** drop-down list. Select Absence Reasor	
14.	Click the **Leave Bank / Donation** list item. Leave Bank / Donation	
15.	Click the **Details** link. Details	
16.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
17.	The Duration automatically populates the hours for the absence request based on the Start and End Dates. For this example, the employee requested 3 days or 24 hours.	

Step	Action	Notes
18.	Click the **OK** button to return to the Timesheet page. OK	
19.	Click the **Forecast** button. Forecast	
20.	This message is confirming the employee has enough leave to submit the absence request.	
21.	Click the **Vertical** scrollbar to move down the page.	
22.	Click the **Submit** button. Submit	
23.	To acknowledge documentation may be required, Click the **OK** button. OK	
24.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. OK	
25.	Click the **OK** button. OK	
26.	Click the **Home** link. Home	
27.	Click the **Sign out** link. Sign out	
28.	You have completed the Request Time Off from a Timesheet with Leave Bank/Donation topic. **End of Procedure - Job Aid.**	

GLOSSARY

activity	In the CONNECT Education and Learning system, **activity** is an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and wait listing capacities.
component	A Component is a collection of pages which are logically grouped.
current learning	In CONNECT Education and Learning, a self-service repository for all of a learner's in-progress learning activities and programs.
delivery method	In CONNECT Education and Learning, identifies the primary type of delivery method in which a particular learning activity is offered. This is primarily used to help learners search the catalog for the type of delivery from which they learn best.
learning components	The foundational building blocks of learning activities that supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	The learning environment identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
planned learning	The plan learning is a self-service repository for all of a learner's planned learning activities and programs.
portal	The Portal is a single entry point to all of CONNECT business processes areas available to the user based on role security access.
search	**Search** is composed of <u>basic</u> and <u>advance</u> search. Both allow you to look up data based on information provided such as Employee ID or Name, or selecting options from drop-down list boxes.
Sign in	To **Sign in** or **Log in** indicates when the site opens, you type in your **User ID** and **Password** to access the secured areas.